

# TAX RETURNS

## **George Bush**

2000 1040

2001 1040

2002 1040

2003 1040

## **Richard Cheney**

2001 1040

2002 1040

2003 1040

Form 1040		Department of the Treasury - Internal Revenue Service		2000		OMB No. 1545-0047	
Label (See instructions on page 18.)		Your first name and initial		Last name		Your social security number	
Use the IRS label. Otherwise, please print or type.		GEORGE W.		BUSH		[REDACTED]	
		If a joint return, spouse's first name and initial		Last name		Spouse's social security number	
		LAURA W.		BUSH		[REDACTED]	
		Home address (number and street). If you have a P.O. box, see page 19.		Apt. no.		▲ IMPORTANT! ▲	
		C/O NORTHERN TRUST CO, 50 S. LASALLE ST, PTS		16		You must enter your SSN(s) above.	
		City, town or post office, state, and ZIP code.					
		CHICAGO, IL 60675					
Presidential Election Campaign (See page 18.)		Note: Checking 'Yes' will not change your tax or reduce your refund. Do you, or your spouse if filing a joint return, want \$5 to go to this fund?		You		Spouse	
				Yes		No	
Filing Status		1 Single		2 Married filing joint return (even if only one had income)		3 Married filing separate return. Enter spouse's soc. sec. no. above and full name here.	
		4 Head of household (with qualifying person). (See page 19.) If the qualifying person is a child but not your dependent, enter the child's name here.		5 Qualifying widow(er) with dependent child (year spouse died) (See page 19.)			
Check only one box.		6a <input checked="" type="checkbox"/> You're still. If your parent (or someone else) can claim you as a dependent on his or her tax return, do not check box 6a.		b <input checked="" type="checkbox"/> Spouse		c Dependents:	
						No. of heads claimed on 6a and 6b	
						2	
						No. of your children on 6c who are living with you	
						2	
						Add numbers entered on lines above	
						4	
						Total number of exemptions claimed	
						7	
						70,554.	
						8	
						549,236.	
						9	
						61,546.	
						10	
						11	
						12	
						314.	
						13	
						138,358.	
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						75,000.	
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						854,880.	
						23	
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						99	
						100	



Form 1040 (2000)

GEORGE W. &amp; LAURA W. BUEN

Page 2

<b>Tax and Credits</b>	24 Amount from line 33 (adjusted gross income)	34	894,880.
	25a Check if: <input type="checkbox"/> You were 65 or older, <input type="checkbox"/> Blind; <input type="checkbox"/> Spouse was 65 or older, <input type="checkbox"/> Blind.		
	Add the number of boxes checked above and enter the total here	25b	
	b If you are married filing separately and your spouse itemizes deductions, or you were a dual-status alien, see page 31 and check here	25c	
	26 Enter your itemized deductions from Schedule A, line 26, or standard deduction shown on the left. But see page 31 to find your standard deduction if you checked any box on line 25a or 25b or if someone can claim you as a dependent	26	150,198.
	27 Subtract line 26 from line 24	27	744,682.
	28 If line 24 is \$30,700 or less, multiply \$2,600 by the total number of exemptions claimed on line 4d. If line 24 is over \$30,700, see the worksheet on page 32 for the amount to enter	28	0.
	29 Taxable income. Subtract line 28 from line 27. If line 28 is more than line 27, enter -0-	29	744,682.
	40 Tax (see page 32). Check if any tax from: <input type="checkbox"/> Form(s) 9874 <input type="checkbox"/> Form 4972	40	240,444.
	41 Alternative minimum tax. Attach Form 8879	41	
	42 Add lines 40 and 41	42	240,444.
	43 Foreign tax credit. Attach Form 1116 if required	43	102.
	44 Credit for child and dependent care expenses. Attach Form 2441	44	
	45 Credit for the elderly or the disabled. Attach Schedule R	45	
	46 Education credits. Attach Form 8883	46	
	47 Child tax credit (see page 36)	47	
	48 Adoption credit. Attach Form 8839	48	
	49 Other. Check if from: <input type="checkbox"/> Form 3800 <input type="checkbox"/> Form 3396 <input type="checkbox"/> Form 8801 <input type="checkbox"/> Form (specify)	49	
	50 Add lines 43 through 49. These are your total credits	50	102.
	51 Subtract line 50 from line 42. If line 50 is more than line 42, enter -0-	51	240,342.
<b>Other Taxes</b>	52 Self-employment tax. Attach Schedule SE	52	
	53 Social Security and Medicare tax on tip income not reported to employer. Attach Form 4137	53	
	54 Tax on IRAs, other retirement plans, and MEAs. Attach Form 5529 if required	54	
	55 Advance earned income credit payments from Form(s) W-2	55	
	56 Household employment taxes. Attach Schedule H	56	
	57 Add lines 51 through 56. This is your total tax	57	240,342.
<b>Payments</b>	58 Federal income tax withheld from Forms W-2 and 1099	58	9,959.
	59 2000 estimated tax payments and amount applied from 1999 return	59	474,917.
	60a Earned income credit (EIC)	60a	
	b Nonrefundable earned income credit: amount and type	60b	
	61 Excess social security and RRTA tax withheld (see page 60)	61	
	62 Additional child tax credit. Attach Form 8812	62	
	63 Amount paid with request for extension to file	63	
	64 Other payments. Check if from: <input type="checkbox"/> Form 2439 <input type="checkbox"/> Form 4136	64	
	65 Add lines 58, 59, 60a, and 61 through 64. These are your total payments	65	484,876.
<b>Refund</b>	66 If line 55 is more than line 57, subtract line 57 from line 55. This is the amount you overpaid	66	244,534.
	67a Amount of line 66 you want refunded to you	67a	117,314.
	b Routing number	b	
	c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	c	
	d Account number	d	
	68 Amount of line 66 you want applied to your 2001 estimated tax	68	127,220.
<b>Amount You Owe</b>	69 If line 57 is more than line 55, subtract line 55 from line 57. This is the amount you owe	69	
	70 Estimated tax penalty. Also include on line 69	70	
<b>Sign Here</b>	Under penalty of perjury, I declare that I have examined this return and accompanying schedule and statements, and to the best of my knowledge and belief they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.		
	Preparer's signature: <i>George W. Buen</i>	Date: 4/10/01	Your occupation: PRESIDENT
	Preparer's signature: <i>Laura W. Buen</i>	Date: 4/10/01	Your occupation: FIRST LADY
<b>Paid Preparer's Use Only</b>	Preparer's signature: <i>George W. Buen</i>	Date: <i>4/10/01</i>	Check if self-employed: <input type="checkbox"/>
	Preparer's name (for your records): <i>George W. Buen</i>	Preparer's address (for your records): <i>PO Box 1000, San Francisco, CA 94101</i>	Preparer's phone (for your records): <i>415/555-1234</i>

**Label**  
(See instructions on page 19.)  
Use the IRS label.  
Otherwise, please print or type.

Label Here

For the year Jan. 1-Dec. 31, 2001, or other tax year beginning 2001, ending 20		CMB No. 1545-0074
Your first name and initial <b>GEORGE W.</b>	Last name <b>BUSH</b>	Your social security number [REDACTED]
If a joint return, spouse's first name and initial <b>LAURA W.</b>	Last name <b>BUSH</b>	Spouse's social security number [REDACTED]
Home address (number and street). If you have a P.O. box, see page 19. <b>C/O NORTHERN TRUST CO, 50 S. LASALLE ST, PTS</b>		Apt. no. <b>L6</b>
City, town or post office, state, and ZIP code. If you have a foreign address, see page 19. <b>CHICAGO, IL 60675</b>		<b>▲ Important! ▲</b> You must enter your SSN(s) above.

**Presidential Election Campaign**  
(See page 19.)

Note. Checking "Yes" will not change your tax or reduce your refund.  
Do you, or your spouse if filing a joint return, want \$3 to go to this fund? ☐ Yes ☐ No ☐ Yes ☐ No

**Filing Status**

1	<input type="checkbox"/> Single
2	<input checked="" type="checkbox"/> Married filing joint return (even if only one had income)
3	Married filing separate return. Enter spouse's social security no. above and full name here. ▶
4	Head of household (with qualifying person). (See page 19.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
5	Qualifying widow(er) with dependent child (year spouse died ▶) (See page 19.)

**Exemptions**

6a	<input checked="" type="checkbox"/> Yourself. If your parent (or someone else) can claim you as a dependent on his or her tax return, do not check box 6a.	No. of boxes checked on 6a and 6b
b	<input checked="" type="checkbox"/> Spouse	2
c	Dependents:	No. of your children on 6c who: <input type="checkbox"/> lived with you <input type="checkbox"/> did not live with you due to divorce or separation (see page 20)
	(1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) If qualifying child for child tax credit (see page 20)	2
	<b>BARBARA P. BUSH</b> [REDACTED] <b>DAUGHTER</b>	
	<b>JENNA W. BUSH</b> [REDACTED] <b>DAUGHTER</b>	
d	Total number of exemptions claimed	4

**Income**

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	381,935.
8a	Taxable interest. Attach Schedule B if required	8a	446,437.
b	Tax-exempt interest. Do not include on line 8a	8b	
9	Ordinary dividends. Attach Schedule B if required	9	43,805.
10	Taxable refunds, credits, or offsets of state and local income taxes	10	
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	84.
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	13	<3,000.>
14	Other gains or (losses). Attach Form 4797	14	
15a	Total (IRA distributions)	15a	
b	Taxable amount (see page 23)	15b	
16a	Total pensions and annuities	16a	
b	Taxable amount (see page 23)	16b	
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	<91,592.>
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation	19	
20a	Social security benefits	20a	
b	Taxable amount (see page 25)	20b	
21	Other income. List type and amount (see page 27) <b>BUSH/CHENEY PRES. TRANS. FNDN. INC 33,431.</b>	21	33,431.
22	Add the amounts in the far right column for lines 7 through 21. This is your total income	22	811,100.

**Adjusted Gross Income**

23	IRA deduction (see page 27)	23	
24	Student loan interest deduction (see page 28)	24	
25	Archer MSA deduction. Attach Form 8853	25	
26	Moving expenses. Attach Form 3903	26	
27	One-half of self-employment tax. Attach Schedule SE	27	
28	Self-employed health insurance deduction (see page 30)	28	
29	Self-employed SEP, SIMPLE, and qualified plans	29	
30	Penalty on early withdrawal of savings	30	
31a	Alimony paid b Recipient's SSN ▶	31a	
32	Add lines 23 through 31a	32	
33	Subtract line 32 from line 22. This is your adjusted gross income	33	811,100.

**Tax and Credits****Standard Deduction for:**

• People who checked any box on line 39a or 39b or who can be claimed as a dependent.

## • All others:

Single, \$4,550  
Head of household, \$5,650

Married filing jointly or Qualifying widow(er), \$7,500

Married filing separately, \$3,600

34	Amount from line 33 (adjusted gross income)	34	811,100.
35a	Check if: <input type="checkbox"/> You were 65 or older, <input type="checkbox"/> Blind; <input type="checkbox"/> Spouse was 65 or older, <input type="checkbox"/> Blind. Add the number of boxes checked above and enter the total here.	35a	
35b	If you are married filing separately and your spouse itemizes deductions, or you were a dual-status alien.	35b	
36	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	36	99,647.
37	Subtract line 36 from line 34	37	711,453.
38	If line 34 is \$99,725 or less, multiply \$2,500 by the total number of exemptions claimed on line 6d. If line 34 is over \$99,725, see the worksheet on page 32.	38	0.
39	Taxable income. Subtract line 38 from line 37. If line 38 is more than line 37, enter -0-	39	711,453.
40	Tax. Check if tax from a <input type="checkbox"/> Form(s) 9814 b <input type="checkbox"/> Form 4972	40	250,221.
41	Alternative minimum tax. Attach Form 6251	41	
42	Add lines 40 and 41	42	250,221.
43	Foreign tax credit. Attach Form 1116 if required	43	19.
44	Credit for child and dependent care expenses. Attach Form 2441	44	
45	Credit for the elderly or the disabled. Attach Schedule R	45	
46	Education credits. Attach Form 8863	46	
47	Rate reduction credit. See the worksheet on page 36	47	
48	Child tax credit (see page 37)	48	
49	Adoption credit. Attach Form 8839	49	
50	Other credits from: a <input type="checkbox"/> Form 3800 b <input type="checkbox"/> Form 8396 c <input type="checkbox"/> Form 8801 d <input type="checkbox"/> Form (specify)	50	
51	Add lines 43 through 50. These are your total credits	51	19.
52	Subtract line 51 from line 42. If line 51 is more than line 42, enter -0-	52	250,202.
53	Self-employment tax. Attach Schedule SE	53	
54	Social security and Medicare tax on tip income not reported to employer. Attach Form 4137	54	
55	Tax on qualified plans, including IRAs, and other tax-favored accounts. Attach 5329 if required	55	
56	Advance earned income credit payments from Form(s) W-2	56	
57	Household employment taxes. Attach Schedule H	57	
58	Add lines 52 through 57. This is your total tax	58	250,202.
59	Federal income tax withheld from Forms W-2 and 1099	59	118,544.
60	2001 estimated tax payments and amount applied from 2000 return	60	127,220.
61a	Earned income credit (EIC)	61a	
61b	Nonrefundable earned income credit	61b	
62	Excess social security and RRTA tax withheld (see page 51) STMT 3	62	408.
63	Additional child tax credit. Attach Form 8812	63	
64	Amount paid with request for extension to file (see page 51)	64	
65	Other payments. Check if from a <input type="checkbox"/> Form 2439 b <input type="checkbox"/> Form 4136	65	
66	Add lines 59, 60, 61a, and 62 through 65. These are your total payments	66	246,172.
67	If line 66 is more than line 58, subtract line 58 from line 66. This is the amount you overpaid	67	
68a	Amount of line 67 you want refunded to you	68a	
68b	Check if type: <input type="checkbox"/> Direct deposit <input type="checkbox"/> Refund by check <input type="checkbox"/> Savings <input type="checkbox"/> Other	68b	
69	Amount of line 67 you want applied to your 2002 estimated tax	69	
70	Amount you owe. Subtract line 66 from line 58. For details on how to pay, see page 52	70	4,030.
71	Estimated tax penalty. Also include on line 70	71	

**Other Taxes****Payments**

If you have a qualifying child, attach Schedule EIC.

**Refund**

Direct deposit? See page 51 and fill in 68b, 68c, and 68d.

**Amount You Owe****Third Party Designee**

Do you want to allow another person to discuss this return with the IRS (see page 53)? ☐ Yes. Complete the following. ☐ No

Designee's name \_\_\_\_\_ Phone no. \_\_\_\_\_ Personal identification number (PIN) \_\_\_\_\_

**Sign Here**

Joint return? See page 18. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature NORTON TROTT Date 4/9/02 Your occupation PRESIDENT Daytime phone number \_\_\_\_\_

Spouse's signature, if a joint return, both must sign. P.Y. Hayslett Elk. V.P. Date 4/9/02 Spouse's occupation FIRST LADY

**Paid****Preparer's Use Only**

Preparer's signature \_\_\_\_\_ Date \_\_\_\_\_ Check if self-employed ☐ Preparer's SSN or PTIN \_\_\_\_\_

Firm's name (or yours if self-employed), address, and ZIP code \_\_\_\_\_ BIN \_\_\_\_\_ Phone no. \_\_\_\_\_



(Form 1040)

Department of the Treasury  
Internal Revenue Service (99)  
Name(s) shown on Form 1040

(Schedule B is on page 2)

▶ Attach to Form 1040.

▶ See instructions for Schedules A and B (Form 1040).

2001

Attachment  
Sequence No. 07

Your social security number

GEORGE W. &amp; LAURA W. BUSH

**Medical  
and  
Dental  
Expenses**

Caution. Do not include expenses reimbursed or paid by others.

- 1 Medical and dental expenses (see page A-2) ..... 1
- 2 Enter amount from Form 1040, line 34 ..... 2
- 3 Multiply line 2 above by 7.5% (.075) ..... 3
- 4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0- ..... 4

**Taxes You  
Paid**(See  
page A-2.)

- 5 State and local income taxes ..... 5
- 6 Real estate taxes (see page A-2) ..... 6
- 7 Personal property taxes ..... 7
- 8 Other taxes. List type and amount  
▶ **AD VALOREM TAXES** ..... 18,823.

9 Add lines 5 through 8 ..... 9

18,823.

**Interest  
You Paid**(See  
page A-3.)

- 10 Home mortgage interest and points reported to you on Form 1098 ..... 10
- 11 Home mortgage interest not reported to you on Form 1098. If paid to the person  
from whom you bought the home, see page A-3 and show that person's name,  
identifying no., and address ..... 11

Note:  
Personal  
interest is  
not  
deductible.

- 12 Points not reported to you on Form 1098. (See page A-3.) ..... 12
- 13 Investment interest. Attach Form 4952 if required. (See page A-3.) ..... 13
- 14 Add lines 10 through 13 ..... 14

**Gifts to  
Charity**If you made a  
gift and got a  
benefit for it,  
see page A-4.

- 15 Gifts by cash or check. If you made any gift of \$250 or more,  
see page A-4 ..... 15 82,700.
- 16 Other than by cash or check. If any gift of \$250 or more, see page A-4.  
You must attach Form 8283 if over \$500 ..... 16
- 17 Carryover from prior year ..... 17
- 18 Add lines 15 through 17 ..... 18 82,700.

**Casualty and  
Theft Losses**

- 19 Casualty or theft loss(es). Attach Form 4684. (See page A-5.) ..... 19

**Job Expenses  
and Most  
Other  
Miscellaneous  
Deductions**(See  
page A-5 for  
expenses to  
deduct here.)

- 20 Unreimbursed employee expenses - job travel, union dues, job education, etc.  
You must attach Form 2106 or 2106-EZ if required. (See page A-5.) ..... 20

- 21 Tax preparation fees ..... 21 1,250.
- 22 Other expenses - investment, safe deposit box, etc. List type and amount  
▶ **SEE STATEMENT 4** ..... 22

- 23 Add lines 20 through 22 ..... 23 33,441.
- 24 Enter amount from Form 1040, line 34 ..... 24 811,100.
- 25 Multiply line 24 above by 2% (.02) ..... 25 16,222.
- 26 Subtract line 25 from line 23. If line 25 is more than line 23, enter -0- ..... 26 18,469.

**Other  
Miscellaneous  
Deductions**

- 27 Other - from list on page A-5. List type and amount  
▶ ..... 27

**Total  
Itemized  
Deductions**

- 28 Is Form 1040, line 34, over \$132,950 (over \$66,475 if married filing separately)? STMT 5
- ☐ No. Your deduction is not limited. Add the amounts in the far right column  
for lines 4 through 27. Also, enter this amount on Form 1040, line 36.
- ☒ Yes. Your deduction may be limited. See page A-6 for the amount to enter.

99,647.

Name(s) shown on Form 1040. Do not enter name and social security number if shown on page 1.

Your social security number

GEORGE W. &amp; LAURA W. BUSH

## Schedule B - Interest and Ordinary Dividends

Attachment  
Sequence No. 08Part I  
Interest

- 1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see page B-1 and list this interest first. Also, show that buyer's social security number and address ▶

BANK ONE

WELLS FARGO BANK TEXAS

BANK OF AMERICA

FROM K-1 - THE LONE STAR TRUST

FROM K-1 - GWB RANGERS CORP.

FROM K-1 - NORTHERN TRUST CO AS TRUSTEE

FROM K-1 - HENRY G. FREEMAN JR TRUST

Amount

54.

120.

50.

435,034.

6,176.

4,710.

293.

Note: If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

- 2 Add the amounts on line 1 ..... 2 446,437.
- 3 Excludable interest on series EE and I U.S. savings bonds issued after 1989 from Form 8815, line 14. You must attach Form 8815 ..... 3
- 4 Subtract line 3 from line 2. Enter the result here and on Form 1040, line 8a ..... 4 446,437.

Note. If line 4 is over \$400, you must complete Part III.

Part II  
Ordinary  
Dividends

- 5 List name of payer. Include only ordinary dividends. If you received any capital gain distributions, see the instructions for Form 1040, line 13. ▶

FROM K-1 - THE LONE STAR TRUST

FROM K-1 - GWB RANGERS CORP.

FROM K-1 - NORTHERN TRUST CO AS TRUSTEE

FROM K-1 - HENRY G. FREEMAN JR TRUST

Amount

14,359.

2,033.

15,706.

11,707.

Note: If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

- 6 Add the amounts on line 5. Enter the total here and on Form 1040, line 9 ..... 6 43,805.

Note. If line 6 is over \$400, you must complete Part III.

Part III  
Foreign  
Accounts  
and  
Trusts

You must complete this part if you (a) had over \$400 of taxable interest or ordinary dividends; (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

- 7a At any time during 2001, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? ..... X

b If "Yes," enter the name of the foreign country ▶

- 8 During 2001, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? ..... X

If "Yes," you may have to file Form 3520. See page B-2.

127501  
10-22-01

LHA For Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule B (Form 1040) 2001

**SCHEDULE C-EZ**  
**(Form 1040)**Department of the Treasury  
Internal Revenue Service (99)**Net Profit From Business****(Sole Proprietorship)**

Partnerships, joint ventures, etc., must file Form 1065 or 1065-B.

Attach to Form 1040 or 1041. See instructions.

OMB No. 1545-0074

**2001**Attachment  
Sequence No. 09A

Name of proprietor

Social security number (SSN)

**GEORGE W. BUSH****Part I** General InformationYou May Use  
Schedule C-EZ  
Instead of  
Schedule C  
Only If You:

- Had business expenses of \$2,500 or less.
- Use the cash method of accounting.
- Did not have an inventory at any time during the year.
- Did not have a net loss from your business.
- Had only one business as a sole proprietor.

**And You:**

- Had no employees during the year.
- Are not required to file Form 4562, Depreciation and Amortization, for this business. See the instructions for Schedule C, line 13, on page C-3 to find out if you must file.
- Do not deduct expenses for business use of your home.
- Do not have prior year unallowed passive activity losses from this business.

**A** Principal business or profession, including product or service**OIL & GAS PRODUCTION****B** Enter code from pages C-7 & 8**211110****C** Business name, if no separate business name, leave blank.**THE LONE STAR TRUST****D** Employer ID number (EIN), if any**E** Business address (including suite or room no.). Address not required if same as on Form 1040, page 1.**P.O. BOX 3362**

City, town or post office, state, and ZIP code

**MIDLAND, TX 79701****Part II** Figure Your Net Profit**1** Gross receipts. Caution. If this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked, see Statutory Employees in the instructions for Schedule C, line 1, on page C-2 and check here.**SEE STATEMENT 6****1****155.****2** Total expenses. If more than \$2,500, you must use Schedule C. See instructions.**SEE STATEMENT 7****2****71.****3** Net profit. Subtract line 2 from line 1. If less than zero, you must use Schedule C. Enter on Form 1040, line 12, and also on Schedule SE, line 2. (Statutory employees do not report this amount on Schedule SE, line 2. Estates and trusts, enter on Form 1041, line 3.)**3****84.****Part III** Information on Your Vehicle. Complete this part **only** if you are claiming car or truck expenses on line 2.**4** When did you place your vehicle in service for business purposes? (month, day, year)**1 / 1****5** Of the total number of miles you drove your vehicle during 2001, enter the number of miles you used your vehicle for:**a** Business **b** Commuting **c** Other**6** Do you (or your spouse) have another vehicle available for personal use?☐ Yes☐ No**7** Was your vehicle available for personal use during on-duty hours?☐ Yes☐ No**8a** Do you have evidence to support your deduction?☐ Yes☐ No**b** If "Yes," is the evidence written?☐ Yes☐ No



## (Form 1040)

Department of the Treasury  
Internal Revenue Service (98)  
Name(s) shown on Form 1040

## Capital Gains and Losses

▶ Attach to Form 1040.

▶ See instructions for Schedule D (Form 1040).

**2001**  
Attachment  
Sequence No. 12

Your social security number

GEORGE W. &amp; LAURA W. BUSH

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired	(d) Sales price	(e) Cost or other basis	(f) Gain or (loss)
	(c) Date sold			Subtract (e) from (d)
1				
2 Enter your short-term totals	2			
3 Total short-term sales price amounts. Add lines 1 and 2 in column (d)	3			
4 Short-term gain from Form 8252 and short-term gain or (loss) from Forms 4684, 6781, and 8824	4			
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	5			<91,360.
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your 2000 Capital Loss Carryover Worksheet	6			
7 Net short-term capital gain or (loss). Combine lines 1 through 6 in column (f)	7			<91,360.

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired	(d) Sales price	(e) Cost or other basis	(f) Gain or (loss)	(g) 28% rate gain or (loss)
	(c) Date sold			Subtract (e) from (d)	(See instr. below)
8					
9 Enter your long-term totals	9				
10 Total long-term sales price amounts. Add lines 8 and 9 in column (d)	10				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 8252; and long-term gain or (loss) from Forms 4684, 6781, and 8824	11				
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	12			55,126.	
13 Capital gain distributions	13				
14 Long-term capital loss carryover. Enter in both columns (f) and (g) the amount, if any, from line 13 of your 2000 Capital Loss Carryover Worksheet	14				
15 Combine lines 8 through 14 in column (g)	15				
16 Net long-term capital gain or (loss). Combine lines 8 through 14 in column (f) Next: Go to Part III on page 2.	16			55,126.	

\* 28% rate gain or loss includes all "collectibles gains and losses" and up to 50% of the eligible gain on qualified small business stock. See instructions.

LHA For Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule D (Form 1040) 2001

Apr 1997  
**SCHEDULE E**  
**(Form 1040)**

**Supplemental Income and Loss**

(From rental real estate, royalties, partnerships,  
S corporations, estates, trusts, REMICs, etc.)

OMB No. 1545-0074

**2001**

Assignment  
Sequence No. 13

Department of the Treasury  
Internal Revenue Service (99)

▶ Attach to Form 1040 or Form 1041.

▶ See instructions for Schedule E (Form 1040).

Name(s) shown on return

Your social security number

**GEORGE W. & LAURA W. BUSH**

**Part I** **Income or Loss From Rental Real Estate and Royalties** Note. If you are in the business of renting personal property, use  
Schedule C or C-EZ (see page E-1). Report farm rental income or loss from Form 4835 on page 2, line 39.

1 Show the kind and location of each rental real estate property:		2 For each rental real estate property listed on line 1, did you or your family use it during the tax year for personal purposes for more than the greater of:		Yes	No
A	THE LONE STAR TRUST - ROYALTY	• 14 days, or	A		
B		• 10% of the total days rented at fair rental value?	B		
C		(See page E-1.)	C		

Income:	Properties			Totals (Add columns A, B, and C.)
	A	B	C	
3 Rents received				3
4 Royalties received	4,944.			4 4,944.
<b>Expenses:</b>				
5 Advertising				
6 Auto and travel (see page E-2)				
7 Cleaning and maintenance				
8 Commissions				
9 Insurance				
10 Legal and other professional fees				
11 Management fees				
12 Mortgage interest paid to banks, etc. (see page E-2)				12
13 Other interest				
14 Repairs				
15 Supplies				
16 Taxes				
17 Utilities				
18 Other (list) ▶ SEE STATEMENT 11	1,069.			
19 Add lines 5 through 18	1,069.			19 1,069.
20 Depreciation expense or depletion (see page E-3)	742.			20 742.
21 Total expenses. Add lines 19 and 20	1,811.			21
22 Income or (loss) from rental real estate or royalty properties. Subtract line 21 from line 3 (rents) or line 4 (royalties). If the result is a (loss), see page E-3 to find out if you must file Form 6198.	3,133.			22
23 Deductible rental real estate loss. Caution. Your rental real estate loss on line 22 may be limited. See page E-3 to find out if you must file Form 8582. Real estate professionals must complete line 42 on page 2				23
24 Income. Add positive amounts shown on line 22. Do not include any losses				24 3,133.
25 Losses. Add royalty losses from line 22 and rental real estate losses from line 23. Enter total losses here				25
26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 59 on page 2 do not apply to you, also enter this amount on Form 1040, line 17. Otherwise, include this amount in the total on line 40 on page 2				26 3,133.

**Part III Taxable Gain or Deductible Loss**

17 Combine lines 7 and 16 and enter the result. If a loss, go to line 18. If a gain, enter the gain on Form 1040, line 13, and complete Form 1040 through line 38.

17 &lt;36,234.&gt;

- Next:
- If both lines 16 and 17 are gains and Form 1040, line 39, is more than zero, complete Part IV below.
  - Otherwise, skip the rest of Schedule D and complete Form 1040.

18 If line 17 is a loss, enter here and on Form 1040, line 13, the smaller of (a) that loss or (b) (\$3,000) (or, if married filing separately, (\$1,500)). Then complete Form 1040 through line 37.

18 ( 3,000.)

- Next:
- If the loss on line 17 is more than the loss on line 18 or if Form 1040, line 37, is less than zero, skip Part IV below and complete the Capital Loss Carryover Worksheet on page D-6 of the instructions before completing the rest of Form 1040.
  - Otherwise, skip Part IV below and complete the rest of Form 1040.

SEE STATEMENT 10

**Part IV Tax Computation Using Maximum Capital Gains Rates**

19 Enter your unrecaptured section 1250 gain, if any, from line 17 of the worksheet on page D-7 of the instructions.

19

If line 18 or line 19 is more than zero, complete the worksheet on page D-8 of the instructions to figure the amount to enter on lines 22, 29, and 40 below, and skip all other lines below. Otherwise, go to line 20.

20 Enter your taxable income from Form 1040, line 39.

20

21 Enter the smaller of line 16 or line 17 of Schedule D.

21

22 If you are deducting investment interest expense on Form 4952, enter the amount from Form 4952, line 4e. Otherwise, enter -0-

22

23 Subtract line 22 from line 21. If zero or less, enter -0-

23

24 Subtract line 23 from line 20. If zero or less, enter -0-

24

25 Figure the tax on the amount on line 24. Use the Tax Table or Tax Rate Schedules, whichever applies.

25

26 Enter the smaller of:

- The amount on line 20 or
- \$45,200 if married filing jointly or qualifying widow(er);  
\$27,050 if single;  
\$35,250 if head of household; or  
\$22,600 if married filing separately

26

If line 26 is greater than line 24, go to line 27. Otherwise, skip lines 27 through 33 and go to line 34.

27 Enter the amount from line 24.

27

28 Subtract line 27 from line 26. If zero or less, enter -0- and go to line 34.

28

29 Enter your qualified 5-year gain, if any, from line 7 of the worksheet on page D-8.

29

30 Enter the smaller of line 28 or line 29.

30

31 Multiply line 30 by 8% (.08).

31

32 Subtract line 31 from line 28.

32

33 Multiply line 32 by 10% (.10).

33

If the amounts on lines 23 and 28 are the same, skip lines 34 through 37 and go to line 38.

34 Enter the smaller of line 20 or line 23.

34

35 Enter the amount from line 28 (if line 28 is blank, enter -0-).

35

36 Subtract line 35 from line 34.

36

37 Multiply line 36 by 20% (.20).

37

38 Add lines 25, 31, 33, and 37.

38

39 Figure the tax on the amount on line 20. Use the Tax Table or Tax Rate Schedules, whichever applies.

39

40 Tax on all taxable income (including capital gains). Enter the smaller of line 39 or line 38 here and on Form 1040, line 40.

40

Your social security number

**GEORGE W. & LAURA W. BUSH**

Note: If you report amounts from farming or fishing on Schedule E, you must enter your gross income from those activities on line 41 below.

Real estate professionals must complete line 42 below.

**Part II Income or Loss From Partnerships and S Corporations** Note: If you report a loss from an at-risk activity, you must check either column (e) or (f) on line 27 to describe your investment in the activity. If you check column (f), you must attach Form 6798.

27	(a) Name	(b) Enter P for partnership, S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	Investment at Risk (e) At risk (f) Not at risk
A	GWB RANGERS CORP.	S			X
B	LONE STAR TRUST: ORDINARY	P			X
C					
D					
E					

Passive Income and Loss		Nonpassive Income and Loss	
(g) Passive loss allowed (attach Form 8582 if required)	(h) Passive income from Schedule K-1	(i) Nonpassive loss from Schedule K-1	(j) Section 179 expense deduction from Form 4582
A		9,928.	
B		84,797.	
C			
D			
E			
28a Totals			
b Totals		94,725.	
29 Add columns (h) and (k) of line 28a			29
30 Add columns (g), (i), and (j) of line 28b			30 ( 94,725. )
31 Total partnership and S corporation income or (loss). Combine lines 29 and 30. Enter the result here and include in the total on line 40 below			31 <94,725.>

**Part III Income or Loss From Estates and Trusts**

32	(a) Name	(b) Employer identification number
A	SEE STATEMENT 12	
B		

Passive Income and Loss		Nonpassive Income and Loss	
(c) Passive deduction or loss allowed (attach Form 8582 if required)	(d) Passive income from Schedule K-1	(e) Deduction or loss from Schedule K-1	(f) Other income from Schedule K-1
A			
B			
33a Totals			
b Totals			
34 Add columns (d) and (f) of line 33a			34
35 Add columns (c) and (e) of line 33b			35 ( )
36 Total estate and trust income or (loss). Combine lines 34 and 35. Enter the result here and include in the total on line 40 below			36

**Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder**

37	(a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c	(d) Taxable income (net loss) from Schedules Q, line 1b	(e) Income from Schedules Q, line 3b
38	Combine columns (d) and (e) only. Enter the result here and include in the total on line 40 below				38

**Part V Summary \* ENTIRE DISPOSITION OF PASSIVE ACTIVITY**

39	Net farm rental income or (loss) from Form 4835. Also, complete line 41 below	39	
40	Total income or (loss). Combine lines 26, 31, 36, 38, and 39. Enter the result here and on Form 1040, line 17	40	<91,592.>
41	Reconciliation of Farming and Fishing Income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), line 15b; Schedule K-1 (Form 1120S), line 23; and Schedule K-1 (Form 1041), line 14 (see page E-6)	41	
42	Reconciliation for Real Estate Professionals. If you were a real estate professional, enter the net income or (loss) you reported anywhere on Form 1040 from all rental real estate activities in which you materially participated under the passive activity loss rules	42	

Form 1040 U.S. Individual Income Tax Return 2002		OMB No. 1545-0078	
For the year Jan. 1-Dec. 31, 2002, or other tax year beginning 2002, ending 20			
<b>Label</b> (See instructions on page 21.)  Use the IRS label. Otherwise, please print or type.	<b>Label</b> Your first name and initial <b>GEORGE W.</b>	<b>Label</b> Last name <b>BUSH</b>	<b>Label</b> Your social security number [REDACTED]
	<b>Label</b> If a joint return, spouse's first name and initial <b>LAURA W.</b>	<b>Label</b> Last name <b>BUSH</b>	<b>Label</b> Spouse's social security number [REDACTED]
	<b>Label</b> Home address (number and street). If you have a P.O. box, see page 21. <b>NORTHERN TRUST CO, 50 S. LASALLE ST, PTS-L6</b>		<b>Label</b> Apt. no. <b>▲ Important! ▲</b> You must enter your SSN(s) above.
	<b>Label</b> City, town or post office, state, and ZIP code. If you have a foreign address, see page 21. <b>CHICAGO, IL 60675</b>		
<b>Presidential Election Campaign</b> (See page 21.)	<b>Note.</b> Checking "Yes" will not change your tax or reduce your refund. Do you, or your spouse if filing a joint return, want \$3 to go to this fund? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Yes <input type="checkbox"/> No		
<b>Filing Status</b>	<input type="checkbox"/> 1 Single <input type="checkbox"/> 4 Head of household (with qualifying person). (See page 21.) If the qualifying person is a child but not your dependent, enter this child's name here. <input type="checkbox"/> 5 Qualifying widow(er) with dependent child (year spouse died) (See page 21.)		
<b>Exemptions</b>	<input checked="" type="checkbox"/> 6a Yourself. If your parent (or someone else) can claim you as a dependent on his or her tax return, do not check box 6a. <input checked="" type="checkbox"/> 6b Spouse. No. of dependents checked on 6a and 6b: <b>2</b> <b>c Dependents:</b> (1) First name Last name (2) Dependent's social security number (3) Dependent's relationship to you (4) Is qualifying child for child tax credit (see page 22) <b>BARBARA P. BUSH DAUGHTER</b> <b>JENNA W. BUSH DAUGHTER</b> No. of your children on 6c who: • lived with you <b>2</b> • did not live with you due to divorce or separation (see page 22) <b>d Total number of exemptions claimed</b> <b>4</b>		
<b>Income</b>  Attach Forms W-2 and W-26 here. Also attach Form(s) 1099-B if tax was withheld.  If you did not get a W-2, see page 23.  Enclose, but do not attach, any payment. Also, please use Form 1040-V.	<b>7</b> Wages, salaries, tips, etc. Attach Form(s) W-2 <b>7</b> <b>397,534.</b> <b>8a</b> Taxable interest. Attach Schedule B if required <b>8a</b> <b>436,028.</b> <b>b</b> Tax-exempt interest. Do not include on line 8a <b>8b</b> <b>9</b> Ordinary dividends. Attach Schedule B if required <b>9</b> <b>23,947.</b> <b>10</b> Taxable refunds, credits, or offsets of state and local income taxes <b>10</b> <b>11</b> Alimony received <b>11</b> <b>12</b> Business income or (loss). Attach Schedule C or C-EZ <b>12</b> <b>13</b> Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/> <b>13</b> <b>&lt;3,000.&gt;</b> <b>14</b> Other gains or (losses). Attach Form 4797 <b>14</b> <b>15a</b> IRA distributions <b>15a</b> <b>b Taxable amount (see page 25)</b> <b>15b</b> <b>15c</b> Pensions and annuities <b>15c</b> <b>b Taxable amount (see page 25)</b> <b>15b</b> <b>17</b> Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E <b>17</b> <b>1,549.</b> <b>18</b> Farm income or (loss). Attach Schedule F <b>18</b> <b>19</b> Unemployment compensation <b>19</b> <b>20a</b> Social security benefits <b>20a</b> <b>b Taxable amount (see page 27)</b> <b>20b</b> <b>21</b> Other income. List type and amount (see page 29) <b>21</b> <b>22</b> Add the amounts in the far right column for lines 7 through 21. This is your total income <b>22</b> <b>856,058.</b> <b>23</b> Educator expenses (see page 29) <b>23</b> <b>24</b> IRA deduction (see page 29) <b>24</b> <b>25</b> Student loan interest deduction (see page 31) <b>25</b> <b>26</b> Tuition and fees deduction (see page 32) <b>26</b> <b>27</b> Archer MSA deduction. Attach Form 8853 <b>27</b> <b>28</b> Moving expenses. Attach Form 3903 <b>28</b> <b>29</b> One-half of self-employment tax. Attach Schedule SE <b>29</b> <b>30</b> Self-employed health insurance deduction (see page 33) <b>30</b> <b>31</b> Self-employed SEP, SIMPLE, and qualified plans <b>31</b> <b>32</b> Penalty on early withdrawal of savings <b>32</b> <b>33a</b> Alimony paid <b>b</b> Recipient's SSN <b>33a</b> <b>34</b> Add lines 23 through 33a <b>34</b> <b>35</b> Subtract line 34 from line 22. This is your adjusted gross income <b>35</b> <b>856,058.</b>		

Form 1040 (2002) **GEORGE W. & LAURA W. BUSH**

**Tax and Credits**

Standard Deduction for -  
• People who checked any box on line 37a or 37b of who can be claimed as a dependent.

• All others:  
Single, \$4,700  
Head of household, \$5,900  
Married filing jointly or Qualifying widow(er), \$7,850  
Married filing separately, \$3,925

36	Amount from line 95 (adjusted gross income)	36	856,058.
37a	Check if: <input type="checkbox"/> You were 65 or older, <input type="checkbox"/> Blind; <input type="checkbox"/> Spouse was 65 or older, <input type="checkbox"/> Blind. Add the number of boxes checked above and enter the total here.	37a	
b	If you are married filing separately and your spouse itemizes deductions, or you were a dual-status alien.	37b	
38	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	38	84,118.
39	Subtract line 38 from line 36	39	771,940.
40	If line 36 is \$103,000 or less, multiply \$3,000 by the total number of exemptions claimed on line 60. If line 36 is over \$103,000, see the worksheet on page 35.	40	0.
41	Taxable income. Subtract line 40 from line 39. If line 40 is more than line 39, enter -0-	41	771,940.
42	Tax. Check if any tax from: a <input type="checkbox"/> Form(s) 9814 b <input type="checkbox"/> Form 4972	42	268,728.
43	Alternative minimum tax. Attach Form 6251	43	
44	Add lines 42 and 43	44	268,728.
45	Foreign tax credit. Attach Form 1116 if required	45	9.
46	Credit for child and dependent care expenses. Attach Form 2441	46	
47	Credit for the elderly or the disabled. Attach Schedule R	47	
48	Education credits. Attach Form 8863	48	
49	Retirement savings contributions credit. Attach Form 8880	49	
50	Child tax credit (see page 39)	50	
51	Adoption credit. Attach Form 8839	51	
52	Credits from: a <input type="checkbox"/> Form 8396 b <input type="checkbox"/> Form 8859	52	
53	Other credits. Check applicable box(es): a <input type="checkbox"/> Form 3800 b <input type="checkbox"/> Form 8801 c <input type="checkbox"/> Specify	53	
54	Add lines 45 through 53. These are your total credits.	54	9.
55	Subtract line 54 from line 44. If line 54 is more than line 44, enter -0-	55	268,719.

**Other Taxes**

56	Self-employment tax. Attach Schedule SE	56	
57	Social security and Medicare tax on tip income not reported to employer. Attach Form 4137	57	
58	Tax on qualified plans, including IRAs, and other tax-favored accounts. Attach 5329 if required	58	
59	Advance earned income credit payments from Form(s) W-2	59	
60	Household employment taxes. Attach Schedule H	60	
61	Add lines 55 through 60. This is your total tax	61	268,719.

**Payments**

If you have a qualifying child, attach Schedule EIC.

62	Federal income tax withheld from Forms W-2 and 1099	62	122,334.
63	2002 estimated tax payments and amount applied from 2001 return	63	170,240.
64	Earned income credit (EIC)	64	
65	Excess social security and tier 1 RRTA tax withheld (see page 56)	65	
66	Additional child tax credit. Attach Form 8812	66	
67	Amount paid with request for extension to file (see page 56)	67	
68	Other payments from: a <input type="checkbox"/> Form 2439 b <input type="checkbox"/> Form 4136 c <input type="checkbox"/> Form 8885	68	
69	Add lines 62 through 68. These are your total payments	69	292,574.

**Refund**

Direct deposit? See page 56 and fill in 77b, 77c, and 77d.

70	If line 69 is more than line 61, subtract line 61 from line 69. This is the amount you overpaid.	70	23,855.
71a	Amount of line 70 you want refunded to you	71a	
b	Routing number	c	Type <input type="checkbox"/> Checking <input type="checkbox"/> Savings
d	Account number		
72	Amount of line 70 you want applied to your 2003 estimated tax	72	23,855.

**Amount You Owe**

73	Amount you owe. Subtract line 69 from line 61. For details on how to pay, see page 57	73	
74	Estimated tax penalty (see page 57)	74	

**Third Party Designee**

Do you want to allow another person to discuss this return with the IRS (see page 58)? ☐ Yes. Complete the following. ☐ No

Designee's name	Phone no.	Personal identification number (PIN)
-----------------	-----------	--------------------------------------

**Sign Here**

Joint return? See page 27. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Preparer's signature	Date	Preparer's occupation	Daytime phone number
<i>George W. Bush</i>	4-2-03	PRESIDENT	
Spouse's signature, if a joint return, both must sign.	Date	Spouse's occupation	
<i>Laura W. Bush</i>	4-2-03	FIRST LADY	

**Paid Preparer's**

Preparer's signature	Date	Check if self-employed <input type="checkbox"/>	Preparer's SSN or PTIN
----------------------	------	---	------------------------

**Use Only**

Firm's name (or yours if self-employed), address, and ZIP code	Phone no.
--	-----------



**SCHEDULES A&B**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (95)

**Schedule A - Itemized Deductions**

(Schedule B is on page 2)

▶ Attach to Form 1040. ▶ See instructions for Schedules A and B (Form 1040).

OMB No. 1545-001

**2002**

Attachment Sequence No. 07

Your social security number

**GEORGE W. & LAURA W. BUSH**

**Medical and Dental Expenses**

Caution. Do not include expenses reimbursed or paid by others.

- 1 Medical and dental expenses (see page A-2) ..... 1  
2 Enter amount from Form 1040, line 36 ..... 2  
3 Multiply line 2 above by 7.5% (.075) ..... 3  
4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0- ..... 4

**Taxes You Paid**

(See page A-2.)

- 5 State and local income taxes ..... 5  
6 Real estate taxes (see page A-2) ..... 6  
7 Personal property taxes ..... 7  
8 Other taxes. List type and amount  
▶ **AD VALOREM TAXES** ..... **19,902.**

9 Add lines 5 through 8 ..... **19,902.**

**Interest You Paid**

(See page A-3.)

- 10 Home mortgage interest and points reported to you on Form 1098 ..... 10  
11 Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home; see page A-3 and show that person's name, identifying no., and address ..... 11

Note: Personal interest is not deductible.

- 12 Points not reported to you on Form 1098. (See page A-3.) ..... 12  
13 Investment interest. Attach Form 4952 if required. (See page A-3.) ..... 13  
14 Add lines 10 through 13 ..... 14

**Gifts to Charity**

If you made a gift and got a benefit for it, see page A-4.

- 15 Gifts by cash or check. If you made any gift of \$250 or more, see page A-4 ..... 15  
16 Other than by cash or check. If any gift of \$250 or more, see page A-4. You must attach Form 8283 if over \$500 ..... 16  
17 Carryover from prior year ..... 17  
18 Add lines 15 through 17 ..... 18

**Casualty and Theft Losses**

- 19 Casualty or theft loss(es). Attach Form 4684. (See page A-5.) ..... 19  
20 Unreimbursed employee expenses - job travel, union dues, job education, etc. You must attach Form 2106 or 2106-EZ if required. (See page A-5.) ..... 20

**Job Expenses and Most Other Miscellaneous Deductions**

(See page A-5 for expenses to deduct here.)

- 21 Tax preparation fees ..... 21  
22 Other expenses - investment, safe deposit box, etc. List type and amount  
▶ **SEE STATEMENT 3** ..... 22

23 Add lines 20 through 22 ..... **32,975.**  
24 Enter amount from Form 1040, line 36 ..... **24 856,058.**  
25 Multiply line 24 above by 2% (.02) ..... **17,121.**  
26 Subtract line 25 from line 23. If line 25 is more than line 23, enter -0- ..... **15,854.**

**Other Miscellaneous Deductions**

- 27 Other - from list on page A-6. List type and amount ..... 27

**Total Itemized Deductions**

- 28 Is Form 1040, line 36, over \$137,300 (over \$68,650 if married filing separately)?  
☐ No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 27. Also, enter this amount on Form 1040, line 36.  
☒ Yes. Your deduction may be limited. See page A-6 for the amount to enter.

STMT 4

**84,118.**

Schedule B (Form 1040) 2002

OMB No. 1545-0074

F

Name(s) shown on Form 1040. Do not enter name and social security number if shown on page 1.

Your social security number

GEORGE W. &amp; LAURA W. BUSH

## Schedule B - Interest and Ordinary Dividends

Attachment  
Sequence No. 08**Part I**  
**Interest**

- 1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see page B-1 and list this interest first. Also, show that buyer's social security number and address ▶

BANK OF AMERICA

BANK ONE

WELLS FARGO BANK TEXAS

US TREASURY: IRS INTEREST

FROM K-1 - THE LONE STAR TRUST

FROM K-1 - GWS RANGERS CORP.

FROM K-1 - NORTHERN TRUST CO AS TRUSTEE

FROM K-1 - HENRY G. FREEMAN JR TRUST

Note: If you received a Form 1099-INT, Form 1099-DIV, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

Amount

20.

25.

44.

3,975.

424,803.

6,000.

1,055.

106.

- 2 Add the amounts on line 1

2

436,028.

- 3 Excludable interest on series EE and I U.S. savings bonds issued after 1989 from Form 8815, line 14. You must attach Form 8815

3

- 4 Subtract line 3 from line 2. Enter the result here and on Form 1040, line 8a ▶

4

436,028.

Note: If line 4 is over \$1,500, you must complete Part III.

**Part II**  
**Ordinary Dividends**

- 5 List name of payer. Include only ordinary dividends. If you received any capital gain distributions, see the instructions for Form 1040, line 13. ▶

FROM K-1 - THE LONE STAR TRUST

FROM K-1 - GWS RANGERS CORP.

FROM K-1 - NORTHERN TRUST CO AS TRUSTEE

FROM K-1 - HENRY G. FREEMAN JR TRUST

Note: If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

Amount

2,612.

199.

9,242.

11,894.

- 6 Add the amounts on line 5. Enter the total here and on Form 1040, line 9 ▶

6

23,947.

Note: If line 6 is over \$1,500, you must complete Part III.

**Part III**  
**Foreign Accounts and Trusts**

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; OR (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

- 7a At any time during 2002, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account?

Yes No

X

- b If "Yes," enter the name of the foreign country ▶

- 8 During 2002, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust?

X

If "Yes," you may have to file Form 3520. See page B-2.

227501  
10-25-02

LHA For Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule B (Form 1040) 2002

CMB No. 7545-007

▶ See instructions for Schedule D (Form 1040).

2002  
Attachment  
Sequence No. 12

YOUR SOCIAL SECURITY NUMBER

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

## Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year

\* 25% rate gain or loss includes all "collectibles gains and losses" and up to 50% of the eligible gain on qualified small business stock. See instructions.

Schedule D (Form 1040) 2002 **GEORGE W. & LAURA W. BUSH****Part III Taxable Gain or Deductible Loss**

**17** Combine lines 7 and 16 and enter the result. If a loss, go to line 18. If a gain, enter the gain on Form 1040, line 13, and complete Form 1040 through line 41.

17 **<117,062.>**

Next: • If both lines 16 and 17 are gains and Form 1040, line 41, is more than zero, complete Part IV below.  
• Otherwise, skip the rest of Schedule D and complete Form 1040.

**18** If line 17 is a loss, enter here and on Form 1040, line 13, the smaller of (a) that loss or (b) (\$3,000) (or, if married filing separately, (\$1,500)). Then complete Form 1040 through line 39.

18 **3,000.**

Next: • If the loss on line 17 is more than the loss on line 18 or if Form 1040, line 39, is less than zero, skip Part IV below and complete the Capital Loss Carryover Worksheet on page D-6 of the instructions before completing the rest of Form 1040. **SEE STATEMENT 7**  
• Otherwise, skip Part IV below and complete the rest of Form 1040.

**Part IV Tax Computation Using Maximum Capital Gains Rates**

**19** Enter your unrecaptured section 1250 gain, if any, from line 17 of the worksheet on page D-7 of the instructions.

19

If line 15 or line 19 is more than zero, complete the worksheet on page D-9 of the instructions to figure the amount to enter on lines 22, 29, and 40 below, and skip all other lines below. Otherwise, go to line 20.

**20** Enter your taxable income from Form 1040, line 41.

20

**21** Enter the smaller of line 16 or line 17 of Schedule D.

21

**22** If you are deducting investment interest expense on Form 4952, enter the amount from Form 4952, line 4e. Otherwise, enter -0-.

22

**23** Subtract line 22 from line 21. If zero or less, enter -0-.

23

**24** Subtract line 23 from line 20. If zero or less, enter -0-.

24

**25** Figure the tax on the amount on line 24. Use the Tax Table or Tax Rate Schedules, whichever applies.

25

**26** Enter the smaller of:

- The amount on line 20 or
- \$46,700 if married filing jointly or qualifying widow(er);  
\$27,950 if single;  
\$37,450 if head of household; or  
\$23,350 if married filing separately

26

If line 26 is greater than line 24, go to line 27. Otherwise, skip lines 27 through 33 and go to line 34.

**27** Enter the amount from line 24.

27

**28** Subtract line 27 from line 26. If zero or less, enter -0- and go to line 34.

28

**29** Enter your qualified 5-year gain, if any, from line 8 of the worksheet on page D-8.

29

**30** Enter the smaller of line 28 or line 29.

30

**31** Multiply line 30 by 8% (.08).

31

**32** Subtract line 30 from line 28.

32

**33** Multiply line 32 by 10% (.10).

33

If the amounts on lines 23 and 28 are the same, skip lines 34 through 37 and go to line 38.

**34** Enter the smaller of line 20 or line 23.

34

**35** Enter the amount from line 28 (if line 28 is blank, enter -0-).

35

**36** Subtract line 35 from line 34.

36

**37** Multiply line 36 by 20% (.20).

37

**38** Add lines 25, 31, 33, and 37.

38

**39** Figure the tax on the amount on line 20. Use the Tax Table or Tax Rate Schedules, whichever applies.

39

**40** Tax on all taxable income (including capital gains). Enter the smaller of line 38 or line 39 here and on Form 1040, line 42.

40

Schedule D (Form 1040) 2002

**SCHEDULE E****(Form 1040)**Department of the Treasury  
Internal Revenue Service (99)**Supplemental income and loss**(From rental real estate, royalties, partnerships,  
S corporations, estates, trusts, REMICs, etc.)

▶ Attach to Form 1040 or Form 1041

▶ See instructions for Schedule E (Form 1040).

OMB No. 1545-0

**2002**Attachment  
Sequence No. 13

Name(s) shown on return

Your social security number

**GEORGE W. & LAURA W. BUSH****Part I** **Income or Loss From Rental Real Estate and Royalties** Note. If you are in the business of renting personal property, use  
Schedule C or C-EZ (see page E-3). Report farm rental income or loss from Form 4835 on page 2, line 35.

1 Show the kind and location of each rental real estate property:		2 For each rental real estate property listed on line 1, did you or your family use it during the tax year for personal purposes for more than the greater of: • 14 days or • 10% of the total days rented at fair rental value? (See page E-3.)		Yes	No
A	B	C			
THE LONE STAR TRUST - ROYALTY					

  

Income:	Properties			Totals (Add columns A, B, and C.)
	A	B	C	
3 Rents received				3
4 Royalties received	2,760.			4 2,760.
<b>Expenses:</b>				
5 Advertising				5
6 Auto and travel (see page E-4)				6
7 Cleaning and maintenance				7
8 Commissions				8
9 Insurance				9
10 Legal and other professional fees				10
11 Management fees				11
12 Mortgage interest paid to banks, etc. (see page E-4)				12
13 Other interest				13
14 Repairs				14
15 Supplies				15
16 Taxes				16
17 Utilities				17
18 Other (list) ▶ SEE STATEMENT 8	797.			18
19 Add lines 5 through 18	797.			19 797.
20 Depreciation expense or depletion (see page E-4)	414.			20 414.
21 Total expenses. Add lines 19 and 20	1,211.			21
22 Income or (loss) from rental real estate or royalty properties. Subtract line 21 from line 3 (rents) or line 4 (royalties). If the result is a (loss), see page E-5 to find out if you must file Form 6198.	1,549.			22
23 Deductible rental real estate loss. Caution. Your rental real estate loss on line 22 may be limited. See page E-5 to find out if you must file Form 8582. Real estate professionals must complete line 42 on page 2				23
24 Income. Add positive amounts shown on line 22. Do not include any losses				24 1,549.
25 Losses. Add royalty losses from line 22 and rental real estate losses from line 23. Enter total losses here				25
26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 39 on page 2 do not apply to you, also enter this amount on Form 1040, line 17. Otherwise, include this amount in the total on line 40 on page 2				26 1,549.



Schedule E (Form 1040) 2002

Attachment Sequence No. 13

Name(s) shown on return. Do not enter name and social security number if shown on page 1.

Your social security number

**GEORGE W. & LAURA W. BUSH**

Note: If you report amounts from farming or fishing on Schedule E, you must enter your gross income from those activities on line 41 below.

Real estate professionals must complete line 42 below.

**Part II Income or Loss From Partnerships and S Corporations** Note: If you report a loss from an at-risk activity, you must check either column (c) or (f) on line 27 to describe your investment in the activity. If you check column (f), you must attach Form 6798.

27	(a) Name	(b) Enter P for partnership; S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Is at risk?	(f) Is not at risk?
A	GWB RANGERS CORP.	S			X	
B						
C						
D						
E						

Passive Income and Loss		Nonpassive Income and Loss		
(g) Passive loss allowed (attach Form 8582 if required)	(h) Passive income from Schedule K-1	(i) Nonpassive loss from Schedule K-1	(j) Section 179 expense deduction from Form 4562	(k) Nonpassive income from Schedule K-1
A				
B				
C				
D				
E				
28a Totals				
b Totals				
29 Add columns (h) and (k) of line 28a				29
30 Add columns (g), (i), and (j) of line 28b				30
31 Total partnership and S corporation income or (loss). Combine lines 29 and 30. Enter the result here and include in the total on line 40 below				31

**Part III Income or Loss From Estates and Trusts**

32	(a) Name	(b) Employer identification number
A	SEE STATEMENT 9	
B		

Passive Income and Loss		Nonpassive Income and Loss	
(c) Passive deduction or loss allowed (attach Form 8582 if required)	(d) Passive income from Schedule K-1	(e) Deduction or loss from Schedule K-1	(f) Other income from Schedule K-1
A			
B			
33a Totals			
b Totals			
34 Add columns (d) and (f) of line 33a			34
35 Add columns (c) and (e) of line 33b			35
36 Total estate and trust income or (loss). Combine lines 34 and 35. Enter the result here and include in the total on line 40 below			36

**Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder**

37	(a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c	(d) Taxable income (net loss) from Schedules Q, line 3b	(e) Income from Schedules Q, line 3b
38 Combine columns (d) and (e) only. Enter the result here and include in the total on line 40 below					38

**Part V Summary**

39 Net farm rental income or (loss) from Form 4835. Also, complete line 41 below		39	
40 Total income or (loss). Combine lines 26, 31, 36, 38, and 39. Enter the result here and on Form 1040, line 17		40	1,549.
41 Reconciliation of Farming and Fishing Income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule K-1 (Form 1065), line 15b; Schedule K-1 (Form 1120S), line 23; and Schedule K-1 (Form 1041), line 14 (see page E-6)	41		
42 Reconciliation for Real Estate Professionals. If you were a real estate professional, enter the net income or (loss) you reported anywhere on Form 1040 from all rental real estate activities in which you materially participated under the passive activity loss rules	42		



1040

## U.S. Individual Income Tax Return

2003

IRS Use Only - Do not write or stamp in this space.

Label  
(See instructions on page 19.)  
Use the IRS label.

Otherwise, please print or type.

Presidential Election Campaign (See page 19.)

Filing Status

Check only one box.

Exemptions

If more than five dependents, see page 21.

Income

Attach Forms W-2 and W-2G here. Also attach Form(s) 1099-R if tax was withheld.

If you did not get a W-2, see page 22.

Enclose, but do not attach, any payment. Also, please use Form 1044-V.

Adjusted Gross Income

910001  
11-18-03

For the year Jan. 1-Dec. 31, 2003, or other tax year beginning

2003, ending

20

OMB No. 1545-0074

Your first name and initial

GEORGE W.

Last name

BUSH

If a joint return, spouse's first name and initial

LAURA W.

Last name

BUSH

Home address (number and street). If you have a P.O. box, see page 19.

Apt. no.

NORTHERN TRUST CO, 50 S. LASALLE ST, PTS-L6

City, town or post office, state, and ZIP code. If you have a foreign address, see page 19.

CHICAGO, IL 60675

Your social security number

Spouse's social security number

▲ Important! ▲

You must enter your SSN(s) above.

Note. Checking "Yes" will not change your tax or reduce your refund.

Do you, or your spouse if filing a joint return, want \$3 to go to this fund? .....

You

Spouse

☐ Yes ☐ No

☐ Yes ☐ No

1 ☐ Single

2 ☒ Married filing jointly (even if only one had income)

3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ▶

4 ☐ Head of household (with qualifying person). (See page 20.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶

6 ☐ Qualifying widow(er) with dependent child. (See page 20.)

6a ☒ Yourself. If your parent (or someone else) can claim you as a dependent on his or her tax return, do not check box 6a .....

b ☒ Spouse .....

c Dependents:

(1) First name

Last name

(2) Dependent's social security number

(3) Dependent's relationship to you

(4) If qualifying child, enter child's age (see page 21)

No. of boxes checked on 6a and 6b

2

No. of children on 6c who:

a lived with you

b did not live with you due to divorce or separation (see page 21)

Dependents on 6c not entered above

Add numbers on lines above

2

d Total number of exemptions claimed .....

7 Wages, salaries, tips, etc. Attach Form(s) W-2 .....

8a Taxable interest. Attach Schedule B if required .....

b Tax-exempt interest. Do not include on line 8a .....

8a Ordinary dividends. Attach Schedule D if required .....

b Qualified dividends (see page 23) .....

10 Taxable refunds, credits, or offsets of state and local income taxes .....

11 Alimony received .....

12 Business income or (loss). Attach Schedule C or C-EZ .....

13a Capital gain or (loss). Attach Schedule D if required. If not required, check here .....

b If box on 13a is checked, enter post-May 5 capital gain distributions .....

14 Other gains or (losses). Attach Form 4797 .....

15a IRA distributions .....

15b Pensions and annuities .....

17 Rental real estate; royalties, partnerships, S corporations, trusts, etc. Attach Schedule E .....

18 Farm income or (loss). Attach Schedule F .....

19 Unemployment compensation .....

20a Social security benefits .....

21 Other income. List type and amount (see page 27) .....

7 397,264.

8a 401,803.

8b 80

8a 23,471.

8b 10,959.

10

11

12

13a <3,000.>

13b

14

15a 15b

15b Taxable amount (see page 25)

15b Taxable amount (see page 25)

17 2,588.

18

19

20a 20b

20b Taxable amount (see page 27)

21

22 Add the amounts in the far right column for lines 7 through 21. This is your total income .....

23 Educator expenses (see page 29) .....

24 IRA deduction (see page 29) .....

25 Student loan interest deduction (see page 31) .....

26 Tuition and fees deduction (see page 32) .....

27 Moving expenses. Attach Form 3903 .....

28 One-half of self-employment tax. Attach Schedule SE .....

28 Self-employed health insurance deduction (see page 33) .....

30 Self-employed SEP, SIMPLE, and qualified plans .....

31 Penalty on early withdrawal of savings .....

32a Alimony paid b Recipient's SSN ▶

33 Add lines 23 through 32a .....

34 Subtract line 33 from line 22. This is your adjusted gross income .....

23

24

25

26

27

28

28

30

31

32a

33

34

822,126.

822,126.

**Tax and Credits**

Standard Deduction for:

• People who checked any box on line 36a or 36b of who can be claimed as a dependent

• All others: Single, or Married filing separately, \$4,750

Married filing jointly or Qualifying widow(er), \$9,000

Head of household, \$7,000

35	Amount from line 34 (adjusted gross income)	35	822,126.
36a	Check <input type="checkbox"/> You were born before January 2, 1939, <input type="checkbox"/> Blind. Total boxes checked <b>▶ 36a</b>		
	If: <input type="checkbox"/> Spouse was born before January 2, 1939, <input type="checkbox"/> Blind. <b>▶ 36b</b>		
	b If you are married filing separately and your spouse has itemized deductions, or you were a dual-status alien		
37	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	37	95,043.
38	Subtract line 37 from line 35	38	727,083.
39	If line 35 is \$104,625 or less, multiply \$3,050 by the total number of exemptions claimed on line 6d. If line 35 is over \$104,625, see the worksheet on page 35	39	0.
40	Taxable income. Subtract line 39 from line 38. If line 39 is more than line 38, enter -0-	40	727,083.
41	Tax. Check if any tax is from: a <input type="checkbox"/> Form(s) 9814 b <input type="checkbox"/> Form 4972	41	227,494.
42	Alternative minimum tax. Attach Form 6251	42	
43	Add lines 41 and 42	43	227,494.
44	Foreign tax credit. Attach Form 1116 if required	44	4.
45	Credit for child and dependent care expenses. Attach Form 2441	45	
46	Credit for the elderly or the disabled. Attach Schedule R	46	
47	Education credits. Attach Form 8863	47	
48	Retirement savings contributions credit. Attach Form 8860	48	
49	Child tax credit (see page 40)	49	
50	Adoption credit. Attach Form 8839	50	
51	Credits from: a <input type="checkbox"/> Form 8396 b <input type="checkbox"/> Form 8859	51	
52	Other credits. Check applicable box(es): a <input type="checkbox"/> Form 3800 b <input type="checkbox"/> Form 8801 c <input type="checkbox"/> Specify	52	
53	Add lines 44 through 52. These are your total credits	53	4.
54	Subtract line 53 from line 43. If line 53 is more than line 43, enter -0-	54	227,490.
55	Self-employment tax. Attach Schedule SE	55	
56	Social security and Medicare tax on tip income not reported to employer. Attach Form 4137	56	
57	Tax on qualified plans, including IRAs, and other tax-favored accounts. Attach Form 5329 if required	57	
58	Advance earned income credit payments from Form(s) W-2	58	
59	Household employment taxes. Attach Schedule H	59	
60	Add lines 54 through 59. This is your total tax	60	227,490.
61	Federal income tax withheld from Forms W-2 and 1099	61	115,661.
62	2003 estimated tax payments and amount applied from 2002 return	62	173,280.
63	Earned income credit (EIC)	63	
64	Excess social security and tier 1 RRTA tax withheld (see page 56)	64	
65	Additional child tax credit. Attach Form 8812	65	
66	Amount paid with request for extension to file (see page 56)	66	
67	Other payments from: a <input type="checkbox"/> Form 2439 b <input type="checkbox"/> Form 4136 c <input type="checkbox"/> Form 8885	67	
68	Add lines 61 through 67. These are your total payments	68	288,941.
69	If line 68 is more than line 60, subtract line 60 from line 68. This is the amount you overpaid	69	61,451.
70a	Amount of line 69 you want refunded to you	70a	
71	Amount of line 69 you want applied to your 2004 estimated tax	71	61,451.
72	Amount you owe. Subtract line 68 from line 60. For details on how to pay, see page 57	72	
73	Estimated tax penalty (see page 58)	73	

**Other Taxes****Payments**

If you have a qualifying child, attach Schedule EIC.

**Refund**

Direct deposit? See page 56 and fill in 70b, 70c, and 70d.

**Amount You Owe****Third Party Designee**Do you want to allow another person to discuss this return with the IRS (see page 58)? ☐ Yes. Complete the following. ☐ No  
Designee's name **▶** Phone no. **▶** Personal identification number (PIN) **▶****Sign****Here**

Joint return? See page 20. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature **B4: Mary Felton - Elkin** 4/5/04 **PRESIDENT** Designee's name **▶**  
Spouse's signature **B4: Mary Felton - Elkin** 4/5/04 **FIRST LADY** Spouse's occupation **▶****Paid Preparer's Use Only**Preparer's signature **▶** Date **▶** Check if self-employed ☐ Preparer's EIN or PTIN **▶**  
Firm's name (for you if self-employed), address, and ZIP code **▶** Phone no. **▶**

**SCHEDULES A&B**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service  
Name shown on Form 1040

**Schedule A - Itemized Deductions**

(Schedule B is on page 2)

▶ Attach to Form 1040. ▶ See instructions for Schedules A and B (Form 1040).

OMB No. 1545-0074

**2003**

Attachment  
Schedule No. 07

Your social security number

**GEORGE W. & LAURA W. BUSH**

<b>Medical and Dental Expenses</b>		Caution. Do not include expenses reimbursed or paid by others.		
1	Medical and dental expenses (see page A-2)	1		
2	Enter amount from Form 1040, line 35	2		
3	Multiply line 2 by 7.5% (.075)	3		
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4		
<b>Taxes You Paid</b>				
5	State and local income taxes	5		
6	Real estate taxes (see page A-2)	6		
7	Personal property taxes	7		
8	Other taxes. List type and amount	8		
▶ <b>AD VALOREM TAXES</b> 21,352.		8	21,352.	
9	Add lines 5 through 8	9		21,352.
<b>Interest You Paid</b>				
10	Home mortgage interest and points reported to you on Form 1098	10		
11	Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see page A-3 and show that person's name, identifying no., and address	11		
Note: Personal interest is not deductible.		12		
12	Points not reported to you on Form 1098. (See page A-3.)	12		
13	Investment interest. Attach Form 4952 if required. (See page A-4.)	13		
14	Add lines 10 through 13	14		
<b>Gifts to Charity</b>				
15	Gifts by cash or check. If you made any gift of \$250 or more, see page A-4	15	68,360.	
16	Other than by cash or check. If any gift of \$250 or more, see page A-4. You must attach Form 8283 if over \$500	16		
17	Carryover from prior year	17		
18	Add lines 15 through 17	18		68,360.
<b>Casualty and Theft Losses</b>				
19	Casualty or theft loss(es). Attach Form 4684. (See page A-5.)	19		
<b>Job Expenses and Most Other Miscellaneous Deductions</b>				
20	Unreimbursed employee expenses - job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See page A-5.)	20		
21	Tax preparation fees	21	2,820.	
22	Other expenses - investment, safe deposit box, etc. List type and amount	22		
▶ <b>SEE STATEMENT 4</b>		22		
23	Add lines 20 through 22	23	39,433.	
24	Enter amount from Form 1040, line 35	24	822,126.	
25	Multiply line 24 by 2% (.02)	25	16,443.	
26	Subtract line 25 from line 23. If line 25 is more than line 23, enter -0-	26		25,810.
<b>Other Miscellaneous Deductions</b>				
27	Other - from list on page A-8. List type and amount	27		
<b>Total Itemized Deductions</b>				
28	Is Form 1040, line 35, over \$139,500 (over \$89,750 if married filing separately)?	28		
<input type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 27. Also, enter this amount on Form 1040, line 37.		STMT 5		
<input checked="" type="checkbox"/> Yes. Your deduction may be limited. See page A-8 for the amount to enter.				95,043.

Name shown on Form 1040. Do not enter name and social security number if shown on page 1.

Your social security number

GEORGE W. &amp; LAURA W. BUSH

## Schedule B - Interest and Ordinary Dividends

Attachment  
Sequence No. 08Part I  
Interest

- 1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see page B-1 and list this interest first. Also, show that buyer's social security number and address ▶

BANK OF AMERICA

BANK ONE

WELLS FARGO BANK

FROM K-1 - THE LONE STAR TRUST

FROM K-1 - GWB RANGERS CORP.

FROM K-1 - NORTHERN TRUST CO AS TRUSTEE

FROM K-1 - HENRY G. FREEMAN JR TRUST

Note: If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

Amount

14.

25.

45.

395,309.

6,120.

238.

52.

- 2 Add the amounts on line 1 ..... 2 401,803.
- 3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8875 ..... 3
- 4 Subtract line 3 from line 2. Enter the result here and on Form 1040, line 8a ..... 4 401,803.

Note: If line 4 is over \$1,500, you must complete Part III.

Part II  
Ordinary  
Dividends

- 5 List name of payer ▶

FROM K-1 - THE LONE STAR TRUST

FROM K-1 - NORTHERN TRUST CO AS TRUSTEE

FROM K-1 - HENRY G. FREEMAN JR TRUST

Amount

3,349.

8,174.

11,948.

Note: If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

- 6 Add the amounts on line 5. Enter the total here and on Form 1040, line 8a ..... 6 23,471.

Note: If line 6 is over \$1,500, you must complete Part III.

Part III  
Foreign  
Accounts  
and  
Trusts

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; or (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

- 7a At any time during 2003, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? ..... X

b If "Yes," enter the name of the foreign country ▶

- 8 During 2003, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? ..... X

If "Yes," you may have to file Form 3520. See page B-2.

327601  
10-13-03

LHA For Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule B (Form 1040) 2003

**SCHEDULE D**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service 990  
Name(s) shown on Form 1040

**Capital Gains and Losses**

▶ Attach to Form 1040.

▶ See instructions for Schedule D (Form 1040).

OMB No. 1545-0074

**2003**

Attachment  
Sequence No. 12

Your social security number

**GEORGE W. & LAURA W. BUSH**

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold (Mo., day, yr.)	(d) Sales price	(e) Cost or other basis	(f) Gain or (loss) for the entire year Subtract (e) from (d)	(g) Post-May 5 gain or (loss) (see instructions)
1 US TSY NOTE 8/15/07	11/06/02	07/10/03	103,617.	101,864.	1,753.	1,753.
US TSY NOTE 8/15/07	01/02/03	07/10/03	103,617.	101,668.	1,949.	1,949.

2 Enter your short-term totals	2					
3 Total short-term sales price amounts. Add lines 1 and 2 in column (d)	3	207,234.				
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4884, 6781, and 8824	4					
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	5	SEE STATEMENT 6				
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your 2002 Capital Loss Carryover Worksheet	6	40,573.				
7a Combine lines 1 through 5 in column (g). If the result is a loss, enter the result. Otherwise, enter -0-. Do not enter more than zero	7a					0.
7b Net short-term capital gain or (loss). Combine lines 1 through 6 in column (f)	7b	<43,834.				

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold (Mo., day, yr.)	(d) Sales price	(e) Cost or other basis	(f) Gain or (loss) for the entire year Subtract (e) from (d)	(g) Post-May 5 gain or (loss) (see instructions)
8 LONE STAR TRUST REDEMPTIONS	VARIOUS	VARIOUS	950,000.	950,000.		
US TSY NOTE 5/15/06	05/15/01	07/10/03	215,737.	198,655.	17,082.	17,082.
US TSY NOTE 5/15/08	08/26/98	07/10/03	341,061.	306,646.	34,415.	34,415.

9 Enter your long-term totals	9					
10 Total long-term sales price amounts. Add lines 8 and 9 in column (d)	10	1,506,798.				
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4884, 6781, and 8824	11					
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	12	<6,173.>				7,683.
13 Capital gain distributions	13					
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your 2002 Capital Loss Carryover Worksheet	14	73,489.				
15 Combine lines 8 through 13 in column (g). If zero or less, enter -0-	15					59,180.
16 Net long-term capital gain or (loss). Combine lines 8 through 14 in column (f) Next: Go to Part III on page 2.	16	<28,165.				

\* Include in column (g) all gains and losses from column (f) from sales, exchanges, or conversions (including installment payments received) after May 5, 2003. However, do not include gain attributable to unrecaptured section 1250 gain, 'collectibles gains and losses' (as defined on page D-8 of the instructions) or eligible gain on qualified small business stock (see page D-4 of the instructions).

**Part III Taxable Gain or Deductible Loss****17 a** Combine lines 7b and 16 and enter the result. If a loss, enter -0- on line 17b and go to line 18.

If a gain, enter the gain on Form 1040, line 13a, and go to line 17b below.

**b** Combine lines 7a and 15. If zero or less, enter -0-. Then complete Form 1040 through line 40.

Next: • If line 16 of Schedule D is a gain or you have qualified dividends on Form 1040,

line 9b, complete Part IV below.

• Otherwise, skip the rest of Schedule D and complete the rest of Form 1040.

**18** If line 17a is a loss, enter here and on Form 1040, line 13a, the smaller of (a) that loss or (b) (\$3,000) (or, if married filing separately, (\$1,500)) (see page D-7 of the instructions) **STMT 8**

Next: • If you have qualified dividends on Form 1040, line 9b, complete Form 1040 through line 40, and then complete Part IV below (but skip lines 19 and 20).

• Otherwise, skip Part IV below and complete the rest of Form 1040.

**Part IV Tax Computation Using Maximum Capital Gains Rates**

If line 18 or line 17a is zero or less, skip lines 19 and 20 and go to line 21. Otherwise, go to line 19.

**19** Enter your unreaptured section 1250 gain, if any, from line 18 of the worksheet**20** Enter your 28% rate gain, if any, from line 7 of the worksheet

If lines 19 and 20 are zero, go to line 21. Otherwise, complete the worksheet on page D-11 of the instructions to figure the amount to enter on lines 35 and 53 below, and skip all other lines below.

**21** Enter your taxable income from Form 1040, line 40**22** Enter the smaller of line 19 or line 17a, but not less than zero**23** Enter your qualified dividends from Form 1040, line 9b**24** Add lines 22 and 23**25** Amount from line 4g of Form 4952 (investment interest expense)**26** Subtract line 25 from line 24. If zero or less, enter -0-**27** Subtract line 26 from line 21. If zero or less, enter -0-**28** Enter the smaller of line 21 or:

• \$56,800 if married filing jointly or qualifying widow(er);

• \$28,400 if single or married filing separately; or

• \$38,050 if head of household

If line 27 is more than line 28, skip lines 29-39 and go to line 40.

**29** Enter the amount from line 27**30** Subtract line 28 from line 28. If zero or less, enter -0- and go to line 40**31** Add lines 17b and 23<sup>a</sup>**32** Enter the smaller of line 30 or line 31**33** Multiply line 32 by 5% (.05)

If lines 30 and 32 are the same, skip lines 34-39 and go to line 40.

**34** Subtract line 32 from line 30**35** Enter your qualified 5-year gain, if any, from line 8 of the worksheet**36** Enter the smaller of line 34 or line 35**37** Multiply line 36 by 8% (.08)**38** Subtract line 36 from line 34**39** Multiply line 36 by 10% (.10)

If lines 28 and 30 are the same, skip lines 40-49 and go to line 50.

**40** Enter the smaller of line 21 or line 28**41** Enter the amount from line 30 (if line 30 is blank, enter -0-)**42** Subtract line 41 from line 40**43** Add lines 17b and 23<sup>a</sup>**44** Enter the amount from line 20 (if line 20 is blank, enter -0-)**45** Subtract line 44 from line 43**46** Enter the smaller of line 42 or line 45**47** Multiply line 46 by 15% (.15)**48** Subtract line 47 from line 42**49** Multiply line 48 by 20% (.20)**50** Figure the tax on the amount on line 27. Use the Tax Table or Tax Rate Schedules, whichever applies**51** Add lines 33, 37, 38, 47, 49, and 50**52** Figure the tax on the amount on line 21. Use the Tax Table or Tax Rate Schedules, whichever applies**53** Tax on all taxable income. Enter the smaller of line 51 or line 52 here and on Form 1040, line 41



**SCHEDULE E**  
**(Form 1040)**

Department of the Treasury  
Internal Revenue Service (2008)

**Supplemental Income and Loss**

(From rental real estate, royalties, partnerships,  
& corporations, estates, trusts, REMICs, etc.)

▶ Attach to Form 1040 or Form 1041.

▶ See instructions for Schedule E (Form 1040).

OMB No. 1545-0074

**2003**

Attachment  
Sequence No. 13

Name(s) shown on return

Your social security number

**GEORGE W. & LAURA W. BUSH**

**Part E** **Income or Loss From Rental Real Estate and Royalties** Now, if you are in the business of renting personal property, use

Schedule E or E-EZ (see page E-2). Report farm rental income or loss from Form 4835 on page 2, line 40.

1 Show the kind and location of each rental real estate property:		2 For each rental real estate property listed on line 1, did you or your family use it during the tax year for personal purposes for more than the greater of:		Yes	No
A	THE LONE STAR TRUST - ROYALTY	• 14 days or	• 10% of the total days rented at fair rental value?	A	
B		(See page E-3.)		B	
C				C	

Income:	Properties			Totals (Add columns A, B, and C.)
	A	B	C	
3 Rents received				3
4 Royalties received	3,944.			4 3,944.
<b>Expenses:</b>				
5 Advertising				5
6 Auto and travel (see page E-4)				6
7 Cleaning and maintenance				7
8 Commissions				8
9 Insurance				9
10 Legal and other professional fees				10
11 Management fees				11
12 Mortgage interest paid to banks, etc. (see page E-4)				12
13 Other interest				13
14 Repairs				14
15 Supplies				15
16 Taxes				16
17 Utilities				17
18 Other (list) ▶ SEE STATEMENT 9	764.			18
19 Add lines 5 through 18	764.			19 764.
20 Depreciation expense or depletion (see page E-4)	592.			20 592.
21 Total expenses. Add lines 18 and 20	1,356.			21
22 Income or (loss) from rental real estate or royalty properties. Subtract line 21 from line 3 (rents) or line 4 (royalties). If the result is a (loss), see page E-4 to find out if you must file Form 9882.	2,588.			22
23 Deductible rental real estate loss. Caution. Your rental real estate loss on line 22 may be limited. See page E-4 to find out if you must file Form 9882. Real estate professionals must complete line 43 on page 2				23
24 Income. Add positive amounts shown on line 22. Do not include any losses				24 2,588.
25 Losses. Add royalty losses from line 22 and rental real estate losses from line 23. Enter total losses here				25 ( )
26 Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17. Otherwise, include this amount in the total on line 47 on page 2				26 2,588.

Name(s) shown on return. Do not enter name and social security number if shown on page 1.

Your social security number

**GEORGE W. & LAURA W. BUSH****Part II Income or Loss From Partnerships and S Corporations** Note. If you report a loss from an at-risk activity for which any amount is not at risk, you must check column (e) on line 28 and attach Form 8198. See page E-1.

27 Are you reporting losses not allowed in prior years due to the at-risk or basis limitations, passive losses not reported on Form 8582, or unreimbursed partnership expenses? ☐ Yes ☒ No  
If you answered "Yes" see page E-5 before completing this section.  
Caution: The IRS compares amounts reported on your tax return with amounts shown on Schedule(s) K-1.

28	(a) Name	(b) Enter P for partnership; S for S corporation	(c) Check if foreign partnership	(d) Employer identification number	(e) Check if any amount is not at risk
A	GWB RANGERS CORP.	S			
B	LSTF, LLC C/O LONE STAR TRUST	P			
C					
D					

Passive Income and Loss		Nonpassive Income and Loss	
(f) Passive loss allowed (attach Form 8582 if required)	(g) Passive income from Schedule K-1	(h) Nonpassive loss from Schedule K-1	(i) Section 179 expense deduction from Form 4582
A			
B			
C			
D			
28a Totals			
b Totals			
30 Add columns (g) and (i) of line 28a			30
31 Add columns (f), (h), and (i) of line 28b			31
32 Total partnership and S corporation income or (loss). Combine lines 30 and 31. Enter the result here and include in the total on line 41 below			32

**Part III Income or Loss From Estates and Trusts**

33	(a) Name	(b) Employer identification number
A	SEE STATEMENT 10	
B		

Passive Income and Loss		Nonpassive Income and Loss	
(c) Passive deduction or loss allowed (attach Form 8582 if required)	(d) Passive income from Schedule K-1	(e) Deduction or loss from Schedule K-1	(f) Other income from Schedule K-1
A			
B			
34a Totals			
b Totals			
35 Add columns (d) and (f) of line 34a			35
36 Add columns (c) and (e) of line 34b			36
37 Total estate and trust income or (loss). Combine lines 35 and 36. Enter the result here and include in the total on line 41 below			37

**Part IV Income or Loss From Real Estate Mortgage Investment Conduits (REMICs) - Residual Holder**

38	(a) Name	(b) Employer identification number	(c) Excess inclusion from Schedules Q, line 2c	(d) Taxable income (net loss) from Schedule Q, line 1c	(e) Income from Schedules Q, line 3b
39	Combine columns (d) and (e) only. Enter the result here and include in the total on line 41 below				39

**Part V Summary**

40	Net farm rental income or (loss) from Form 4835. Also, complete line 42 below	40	
41	Total income or (loss). Combine lines 26, 32, 37, 39, and 40. Enter the result here and on Form 1040, line 17.	41	2,588.
42	Reconciliation of Farming and Fishing Income. Enter your gross farming and fishing income reported on Form 4835, line 7; Schedule X-1 (Form 1065), line 15b; Schedule K-1 (Form 1120S), line 29; and Schedule K-1 (Form 1041), line 14 (see page E-6)	42	
43	Reconciliation for Real Estate Professionals. If you were a real estate professional, (see page E-1), enter the net income or (loss) you reported anywhere on Form 1040 from all rental real estate activities in which you materially participated under the passive activity loss rules	43	

Label (See instructions on page 10.) Use the IRS label. Otherwise, please print or type.	LABEL HERE	For the year Jan. 1-Dec. 31, 2001, or other tax year beginning 2001, ending 20		CMB No. 1845-0074
		Your first name and initial <b>RICHARD B.</b>	Last name <b>CHENEY</b>	Your social security number [REDACTED]
		If a joint return, spouse's first name and initial <b>LYNNE V.</b>	Last name <b>CHENEY</b>	Spouse's social security number [REDACTED]
		Home address (number and street). If you have a P.O. box, see page 19. <b>4205 GREENS PLACE</b>		Apt. no.
City, town or post office, state, and ZIP code. If you have a foreign address, see page 19. <b>WILSON, WY 83014</b>				
Presidential Election Campaign (See page 19.)	Note. Checking "Yes" will not change your tax or reduce your refund. Do you, or your spouse if filing a joint return, want \$3 to go to this fund? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			

Filing Status Check only one box.	1 <input type="checkbox"/> Single
	2 <input checked="" type="checkbox"/> Married filing joint return (even if only one had income)
	3 <input type="checkbox"/> Married filing separate return. Enter spouse's social security no. above and full name here.
	4 <input type="checkbox"/> Head of household (with qualifying person). (See page 19.) If the qualifying person is a child but not your dependent, enter this child's name here.
	5 <input type="checkbox"/> Qualifying widow(er) with dependent child (year spouse died _____). (See page 19.)

Exemptions If more than six dependents, see page 20.	6a <input checked="" type="checkbox"/> Yourself. If your parent (or someone else) can claim you as a dependent on his or her tax return, do not check box 6a.	No. of boxes checked on 6a and 6b
	6b <input checked="" type="checkbox"/> Spouse	2
	7 Dependents:	No. of your children on 6a who lived with you
	8 Total number of exemptions claimed	2

Income Attach Forms W-2 and W-2B here. Also attach Form(s) 1099-R if tax was withheld. If you did not get a W-2, see page 21. Enclose, but do not attach, any payment. Also, please use Form 1040-V.	7 Wages, salaries, tips, etc. Attach Form(s) W-2	7	1,853,452.	
	8a Taxable interest. Attach Schedule B if required	8a	88,535.	
	8b Tax-exempt interest. Do not include on line 8a	8b	778,068.	
	9 Ordinary dividends. Attach Schedule B if required	9	278,103.	
	10 Taxable refunds, credits, or offsets of state and local income taxes	10		
	11 Alimony received	11		
	12 Business income or (loss). Attach Schedule C or C-EZ	12	2,343,332.	
	13 Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	13	<3,000.	
	14 Other gains or (losses). Attach Form 4797	14		
	15a Total IRA distributions	15a		
	15b Taxable amount (see page 23)	15b		
	16a Total pensions and annuities	16a	65,745.	
	16b Taxable amount (see page 23)	16b	50,000.	
	17 Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17		
	18 Farm income or (loss). Attach Schedule F	18		
	19 Unemployment compensation	19		
	20a Social security benefits	20a		
	20b Taxable amount (see page 25)	20b		
	21 Other income. List type and amount (see page 27) <b>BUSH - CHENEY PRESIDENTIAL TRANSITIONAL FOUNDATION, INC. 46,198.</b>	21	46,198.	
	22 Add the amounts in the far right column for lines 7 through 21. This is your total income	22	4,722,365.	
	Adjusted Gross Income	23 IRA deduction (see page 27)	23	
		24 Student loan interest deduction (see page 28)	24	
25 Archer MSA deduction. Attach Form 8853		25		
26 Moving expenses. Attach Form 3903		26		
27 One-half of self-employment tax. Attach Schedule SE		27	31,404.	
28 Self-employed health insurance deduction (see page 30)		28		
29 Self-employed SEP, SIMPLE, and qualified plans		29	334,336.	
30 Penalty on early withdrawal of savings		30		
31a Alimony paid to Recipient's SSN		31a		
32 Add lines 23 through 31a		32	365,740.	
33 Subtract line 32 from line 22. This is your adjusted gross income	33	4,356,625.		

# Tax and Credits

Standard Deduction for:  
 • People who checked any box on line 33a or 33b or who can be claimed as a dependent

• All others:  
 Single, \$4,550  
 Head of household, \$5,650  
 Married filing jointly or Qualifying widow(er), \$7,600  
 Married filing separately, \$3,800

34	Amount from line 33 (adjusted gross income)	34	4,356.625
35a	Check if: <input type="checkbox"/> You were 65 or older, <input type="checkbox"/> Blind; <input type="checkbox"/> Spouse was 65 or older, <input type="checkbox"/> Blind. Add the number of boxes checked above and enter the total here	35a	
35b	If you are married filing separately and your spouse itemizes deductions, or you were a dual-status alien	35b	
36	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	36	48.483
37	Subtract line 36 from line 34	37	4,308.142
38	If line 34 is \$99,725 or less, multiply \$2,000 by the total number of exemptions claimed on line 8d. If line 34 is over \$99,725, see the worksheet on page 32	38	0
39	Taxable income. Subtract line 38 from line 37. If line 38 is more than line 37, enter -0-	39	4,308.142
40	Tax. Check if tax from a <input type="checkbox"/> Form(s) 9814 b <input type="checkbox"/> Form 4972	40	1,656.526
41	Alternative minimum tax. Attach Form 8261	41	0
42	Add lines 40 and 41	42	1,656.526
43	Foreign tax credit. Attach Form 1118 if required	43	
44	Credit for child and dependent care expenses. Attach Form 2441	44	
45	Credit for the elderly or the disabled. Attach Schedule R	45	
46	Education credits. Attach Form 8863	46	
47	Rate reduction credit. See the worksheet on page 38	47	
48	Child tax credit (see page 37)	48	
49	Adoption credit. Attach Form 8839	49	
50	Other credits from: a <input type="checkbox"/> Form 3800 b <input type="checkbox"/> Form 8396 c <input type="checkbox"/> Form 8801 d <input type="checkbox"/> Form (specify)	50	
51	Add lines 43 through 50. These are your total credits	51	
52	Subtract line 51 from line 42. If line 51 is more than line 42, enter -0-	52	1,656.526

## Other Taxes

53	Self-employment tax. Attach Schedule SE	53	62.808
54	Social security and Medicare tax on tip income not reported to employer. Attach Form 4137	54	
55	Tax on qualified plans, including IRAs, and other tax-favored accounts. Attach 5329 if required	55	
56	Advance earned income credit payments from Form(s) W-2	56	
57	Household employment taxes. Attach Schedule H	57	937
58	Add lines 52 through 57. This is your total tax	58	1,720.271

## Payments

If you have a qualifying child, attach Schedule EIC.

59	Federal income tax withheld from Forms W-2 and 1099	59	520.813
60	2001 estimated tax payments and amount applied from 2000 return	60	1,215.000
61a	Earned income credit (EIC)	61a	
61b	Nontaxable earned income	61b	
62	Excess social security and RRTA tax withheld (see page 51) Stmt. 1	62	4.985
63	Additional child tax credit. Attach Form 8812	63	
64	Amount paid with request for extension to file (see page 51)	64	
65	Other payments. Check if from a <input type="checkbox"/> Form 2439 b <input type="checkbox"/> Form 4136	65	
66	Add lines 59, 60, 61a, and 62 through 65. These are your total payments	66	1,740.798

## Refund

Direct deposit? See page 51 and fill in 88b, 88c, and 88d.

67	If line 66 is more than line 58, subtract line 58 from line 66. This is the amount you overpaid	67	20.527
68a	Amount of line 67 you want refunded to you	68a	
68b	Routing number	68b	
68c	Account type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/> Other	68c	
68d	Amount of line 67 you want applied to your 2002 estimated tax	68d	20.527

## Amount You Owe

70	Amount you owe. Subtract line 68 from line 58. For details on how to pay, see page 62	70	
71	Estimated tax penalty. Also include on line 70	71	

## Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see page 53)? ☒ Yes. Complete the following. ☐ No

Designee's name	Preparer	Phone no.		Personal identification number (PIN)	
-----------------	----------	-----------	--	--------------------------------------	--

## Sign Here

Joint return? See page 19. Keep a copy for your records.

Under penalty of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Taxpayer's signature	Richard B. Chang	Date	4-12-02	Your occupation	VICE PRESIDENT	Daytime phone number	
Preparer's signature	Lynne R. [Signature]	Date	4/12/02	Preparer's occupation	EXECUTIVE		

## Paid

Preparer's Use Only

Preparer's signature	Lynne R. [Signature]	Date	9 April 02	Check if self-employed	<input type="checkbox"/>	Preparer's SSN or PTIN	
Firm's name (or yours if self-employed), address, and ZIP code	ARTHUR ANDERSEN LLP 901 MAIN STREET, SUITE 5600 DALLAS, TX 75202			Phone no.	3610732690		

Form 1040

Department of Treasury - Internal Revenue Service

## U.S. Individual Income Tax Return 2002

(99)

IRS Use Only - Do not write or stamp in this space.

## Label

(See Instructions on page 21.)

Use the IRS label. Otherwise, please print or type.

For the year Jan. 1-Dec. 31, 2002, or other tax year beginning		2002, ending	OMB No. 1545-0074
Label L A B E L  H E R E	Your first name and initial <b>RICHARD B</b>	Last name <b>CHENEY</b>	Your social security number [REDACTED]
	If a joint return, spouse's first name and initial <b>LYNNE V</b>	Last name <b>CHENEY</b>	Spouse's social security number [REDACTED]
	Home address (number and street). If you have a P.O. box, see page 21. [REDACTED]		Apt. no. [REDACTED]
	City, town or post office, state, and ZIP code. If you have a foreign address, see page 21. [REDACTED]		

**Important!**  
You must enter your SSN(s) above.

## Presidential Election Campaign (See page 21.)

Note. Checking "Yes" will not change your tax or reduce your refund.

Do you, or your spouse if filing a joint return, want \$3 to go to this fund? ☒ Yes ☐ No ☒ Yes ☐ No

## Filing Status

- 1 ☐ Single
- 2 ☒ Married filing jointly (even if only one had income)
- 3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ☐
- 4 ☐ Head of household (with qualifying person). (See page 21.) If the qualifying person is a child but not your dependent, enter this child's name here. ☐
- 6 ☐ Qualifying widow(er) with dependent child (year spouse died ☐). (See page 21.)

## Exemptions

- 6a ☒ Yourself. If your parent (or someone else) can claim you as a dependent on his or her tax return, do not check box 6a
- b ☒ Spouse
- c Dependents:
- | (1) First name | Last name | (2) Dependent's social security number | (3) Dependent's relationship to you | (4) <input checked="" type="checkbox"/> If qualifying child for credit for other dependent child (see page 22) |
|----------------|-----------|--|-------------------------------------|--|
|                |           |  |                                     |  |
|                |           |  |                                     |  |
|                |           |  |                                     |  |
|                |           |  |                                     |  |
- d Total number of exemptions claimed ☐ 2

## Income

Attach Forms W-2 and W-2G here. Also attach Form(s) 1099-R if tax was withheld.

If you did not get a W-2, see page 23.

## ROLLOVER

Enclose, but do not attach, any payment. Also, please use Form 1040-V.

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	432,526.
8a	Taxable interest. Attach Schedule B if required	8a	5,363.
b	Tax-exempt interest. Do not include on line 8a	8b	559,461.
9	Ordinary dividends. Attach Schedule B if required	9	490,999.
10	Taxable refunds, credits, or offsets of state and local income taxes (see page 24)	10	
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	129,076.
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	13	2,799.
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions	15a	
b	Taxable amount (see page 25)	15b	
16a	Pensions and annuities	16a	1,575,477.
b	Taxable amount (see page 25)	16b	NONE
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	109,606.
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation	19	
20a	Social security benefits	20a	
b	Taxable amount (see page 27)	20b	
21	Other income. List type and amount (see page 29)	21	
22	Add the amounts in the far right column for lines 7 through 21. This is your total income	22	1,170,369.
23	Educator expenses (see page 29)	23	
24	IRA deduction (see page 29)	24	
25	Student loan interest deduction (see page 31)	25	
26	Tuition and fees deduction (see page 32)	26	
27	Archer MSA deduction. Attach Form 8853	27	
28	Moving expenses. Attach Form 3903	28	
29	One-half of self-employment tax. Attach Schedule SE	29	3,634.
30	Self-employed health insurance deduction (see page 33)	30	
31	Self-employed SEP, SIMPLE, and qualified plans	31	
32	Penalty on early withdrawal of savings	32	
33a	Alimony paid b Recipient's SSN <input type="checkbox"/>	33a	
34	Add lines 23 through 33a	34	3,634.
35	Subtract line 34 from line 22. This is your adjusted gross income	35	1,166,735.

## Adjusted Gross Income

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 76.

Form 1040 (2002)



Form 1040

Department of the Treasury - Internal Revenue Service

## U.S. Individual Income Tax Return 2002

(99)

IRS Use Only - Do not write or stamp in this space.

## Label

(See Instructions on page 21.)

Use the IRS label. Otherwise, please print or type.

For the year Jan. 1-Dec. 31, 2002, or other tax year beginning

2002, ending

OMB No. 1545-0074

Your first name and initial

Last name

RICHARD B

CHENEY

If a joint return, spouse's first name and initial

Last name

LYNNE V

CHENEY

Home address (number and street). If you have a P.O. box, see page 21.

Apt. no.

City, town or post office, state, and ZIP code. If you have a foreign address, see page 21.

Your social security number

Spouse's social security number

▲ Important! ▲

You must enter your SSN(s) above.

You

Spouse

Presidential Election Campaign (See page 21.)

Note. Checking "Yes" will not change your tax or reduce your refund.

Do you, or your spouse if filing a joint return, want \$3 to go to this fund?

▶

☒ Yes☐ No☒ Yes☐ No

## Filing Status

- 1 ☐ Single
- 2 ☒ Married filing jointly (even if only one had income)
- 3 ☐ Married filing separately. Enter spouse's SSN above and full name here. ▶

- 4 ☐ Head of household (with qualifying person). (See page 21.) If the qualifying person is a child but not your dependent, enter this child's name here. ▶
- 6 ☐ Qualifying widow(er) with dependent child (year spouse died ▶). (See page 21.)

## Exemptions

- 6a ☒ Yourself. If your parent (or someone else) can claim you as a dependent on his or her tax return, do not check box 6a

- b ☒ Spouse

- c Dependents:

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input checked="" type="checkbox"/> If qualifying child for credit for child tax credit (see page 22)

If more than five dependents, see page 22.

No. of boxes checked on 6a and 6b

2

No. of children on 6c who:

• lived with you

• did not live with you due to divorce or separation (see page 22)

Dependents on 6c not entered above

Add numbers on lines above

2

- d Total number of exemptions claimed

## Income

Attach Forms W-2 and W-2G here. Also attach Form(s) 1099-R if tax was withheld.

If you did not get a W-2, see page 23.

## ROLLOVER

Enclose, but do not attach, any payment. Also, please use Form 1040-V.

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	432,526.
8a	Taxable interest. Attach Schedule B if required	8a	5,363.
b	Tax-exempt interest. Do not include on line 8a	8b	559,461.
9	Ordinary dividends. Attach Schedule B if required	9	490,999.
10	Taxable refunds, credits, or offsets of state and local income taxes (see page 24)	10	
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	129,076.
13	Capital gain or (loss). Attach Schedule D if required. If not required, check here ▶ <input type="checkbox"/>	13	2,799.
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions	15a	
b	Taxable amount (see page 25)	15b	
16a	Pensions and annuities	16a	1,575,477.
b	Taxable amount (see page 25)	16b	NONE
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	109,606.
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation	19	
20a	Social security benefits	20a	
b	Taxable amount (see page 27)	20b	
21	Other income. List type and amount (see page 29)	21	
22	Add the amounts in the far right column for lines 7 through 21. This is your total income	22	1,170,369.

## Adjusted Gross Income

23	Educator expenses (see page 29)	23	
24	IRA deduction (see page 29)	24	
25	Student loan interest deduction (see page 31)	25	
26	Tuition and fees deduction (see page 32)	26	
27	Archer MSA deduction. Attach Form 8853	27	
28	Moving expenses. Attach Form 3903	28	
29	One-half of self-employment tax. Attach Schedule SE	29	3,634.
30	Self-employed health insurance deduction (see page 33)	30	
31	Self-employed SEP, SIMPLE, and qualified plans	31	
32	Penalty on early withdrawal of savings	32	
33a	Alimony paid b Recipient's SSN ▶	33a	
34	Add lines 23 through 33a	34	3,634.
35	Subtract line 34 from line 22. This is your adjusted gross income	35	1,166,735.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 76.

Form 1040 (2002)

FORM 1040 (2002) **RICHARD B CHENEY & LYNNE V CHENEY**

Pg

**Tax and Credits****Standard Deduction for -**

• People who checked any box on line 37a or 37b or who can be claimed as a dependent, see page 31.

• All others

Single,  
\$4,700

Head of household,  
\$6,900

Married filing jointly or Qualifying widow(er),  
\$7,850

Married filing separately,  
\$3,925

36	Amount from line 35 (adjusted gross income)	36	1,166,73
37a	Check if: <input type="checkbox"/> You were 65 or older, <input type="checkbox"/> Blind; <input type="checkbox"/> Spouse was 65 or older, <input type="checkbox"/> Blind. Add the number of boxes checked above and enter the total here.	37a	
b	If you are married filing separately and your spouse itemizes deductions, or you were a dual-status alien, see page 34 and check here.	37b	
38	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	38	221,684.
39	Subtract line 38 from line 36	39	945,051.
40	If line 36 is \$103,000 or less, multiply \$3,000 by the total number of exemptions claimed on line 6d. If line 36 is over \$103,000, see the worksheet on page 35	40	SEE STMT 3 NONE
41	Taxable income. Subtract line 40 from line 39. If line 40 is more than line 39, enter -0-	41	945,051.
42	Tax (see page 36). Check if any tax is from: a <input type="checkbox"/> Form(s) 9814 b <input type="checkbox"/> Form 4972	42	335,028.
43	Alternative minimum tax (see page 37). Attach Form 6251	43	NONE
44	Add lines 42 and 43	44	335,028.
45	Foreign tax credit. Attach Form 1116 if required	45	2,052.
46	Credit for child and dependent care expenses. Attach Form 2441	46	
47	Credit for the elderly or the disabled. Attach Schedule R	47	
48	Education credits. Attach Form 8863	48	
49	Retirement savings contributions credit. Attach Form 8880	49	
50	Child tax credit (see page 39)	50	
51	Adoption credit. Attach Form 8839	51	
52	Credits from: a <input type="checkbox"/> Form 8396 b <input type="checkbox"/> Form 8859	52	
53	Other credits. Check applicable box(es): a <input type="checkbox"/> Form 3800 b <input type="checkbox"/> Form 8801 c <input type="checkbox"/> Specify	53	
54	Add lines 45 through 53. These are your total credits	54	2,052.
55	Subtract line 54 from line 44. If line 54 is more than line 44, enter -0-	55	332,976.
56	Self-employment tax. Attach Schedule SE	56	7,268.
57	Social security and Medicare tax on tip income not reported to employer. Attach Form 4137	57	
58	Tax on qualified plans, including IRAs, and other tax-favored accounts. Attach Form 5329 if required	58	
59	Advance earned income credit payments from Form(s) W-2	59	
60	Household employment taxes. Attach Schedule H	60	870.
61	Add lines 55 through 60. This is your total tax	61	341,114.
62	Federal income tax withheld from Forms W-2 and 1099	62	101,445.
63	2002 estimated tax payments and amount applied from 2001 return	63	335,527.
64	Earned income credit (EIC)	64	
65	Excess social security and tier 1 RRTA tax withheld (see page 56)	65	
66	Additional child tax credit. Attach Form 8812	66	
67	Amount paid with request for extension to file (see page 56)	67	
68	Other payments from: a <input type="checkbox"/> Form 2439 b <input type="checkbox"/> Form 4136 c <input type="checkbox"/> Form 8885	68	
69	Add lines 62 through 68. These are your total payments	69	436,972.
70	If line 69 is more than line 61, subtract line 61 from line 69. This is the amount you overpaid	70	95,858.
71a	Amount of line 70 you want refunded to you	71a	75,858.
b	Routing number	c	Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings
d	Account number		
72	Amount of line 70 you want applied to your 2003 estimated tax	72	20,000.
73	Amount you owe. Subtract line 69 from line 61. For details on how to pay, see page 57	73	
74	Estimated tax penalty. (see page 57)	74	NONE

If you have a qualifying child, attach Schedule EIC.

**Refund**

Direct deposit? See page 56 and fill in 71b, 71c, and 71d.

**Amount You Owe****Third Party Designee**

Do you want to allow another person to discuss this return with the IRS (see page 58)? ☒ Yes. Complete the following. ☐ No

Designee's name **PREPARER** Phone no. **714** Personal identification number (PIN) **714**

**Sign Here**

Joint return? See page 21. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature **Richard B. Cheney** Date **4-10-03** Your occupation **VICE PRESIDENT**

Spouse's signature, if a joint return, both must sign. **Lynne V. Cheney** Date **4/10/03** Spouse's occupation **EXECUTIVE**

**Paid****Preparer's Use Only**

Preparer's signature **Lynne V. Cheney** Date **9 April '03** Check if self-employed ☐ Preparer's SSN or PTIN **75201**

Firm's name (or yours if self-employed), address, and ZIP code **KPMG LLP** EIN **75201**

**717 N. HARWOOD STREET, SUITE 3100** Phone no. **75201**

**DALLAS TX**

Form **2210****Underpayment of  
Estimated Tax by Individuals, Estates, and Trusts**

OMB No. 1545-01

**2002**Department of the Treasury  
Internal Revenue Service

▶ See separate instructions.

▶ Attach to Form 1040, 1040A, 1040NR, 1040NR-EZ, or 1041.

Attachment  
Sequence No. **06**

Name(s) shown on tax return

Identifying number

**RICHARD B CHENEY & LYNNE V CHENEY**

In most cases, you do not need to file Form 2210. The IRS will figure any penalty you owe and send you a bill. File Form 2210 only if one or more boxes in Part I apply to you. If you do not need to file Form 2210, you still may use it to figure your penalty. Enter the amount from Part III, line 22, or Part IV, line 36, on the penalty line of your return, but do not attach Form 2210.

**Part I** Reasons for Filing - If 1a, 1b, or 1c below applies to you, you may be able to lower or eliminate your penalty. But you must check the boxes that apply and file Form 2210 with your tax return. If 1d below applies to you, check that box and file Form 2210 with your tax return.

1 Check whichever boxes apply (if none apply, see the text above Part I and do not file Form 2210):

- a ☐ You request a waiver. In certain circumstances, the IRS will waive all or part of the penalty. See Waiver of Penalty on page 2 of the instructions.
- b ☐ You use the annualized income installment method. If your income varied during the year, this method may reduce the amount of one or more required installments. See page 5 of the instructions.
- c ☒ You had Federal income tax withheld from wages and, for estimated tax purposes, you treat the withheld tax as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. See the instructions for line 23 on page 3.
- d ☐ Your required annual payment (line 15 below) is based on your 2001 tax and you filed or are filing a joint return for either 2001 or 2002 but not for both years.

**Part II** Required Annual Payment

2	Enter your 2002 tax after credits (see page 2 of the instructions)	2	332,976.
3	Other taxes (see page 2 of the instructions)	3	8,138.
4	Add lines 2 and 3.	4	341,114.
5	Earned income credit	5	
6	Additional child tax credit	6	
7	Credit for Federal tax paid on fuels	7	
8	Health insurance credit for eligible recipients	8	
9	Add lines 5 through 8	9	
10	Current year tax. Subtract line 9 from line 4.	10	341,114.
11	Multiply line 10 by 90% (.90)	11	307,003.
12	Withholding taxes. Do not include any estimated tax payments on this line (see page 3 of the instructions)	12	101,445.
13	Subtract line 12 from line 10. If less than \$1,000, stop here; you do not owe the penalty. Do not file Form 2210	13	239,669.
14	Enter the tax shown on your 2001 tax return (112% of that amount if the adjusted gross income shown on that return is more than \$150,000, or, if married filing separately for 2002, more than \$75,000). Caution: See page 3 of the instructions	14	1,926,704.
15	Required annual payment. Enter the smaller of line 11 or line 14. If line 12 is equal to or more than line 15, stop here; you do not owe the penalty. Do not file Form 2210 unless you checked box 1d above.	15	307,003.

**Part III** Short Method (Caution: See page 3 of the instructions to find out if you can use the short method. If you checked box 1b or 1c in Part I, skip this part and go to Part IV.)

16	Enter the amount, if any, from line 12 above	16	
17	Enter the total amount, if any, of estimated tax payments you made	17	
18	Add lines 16 and 17	18	
19	Total underpayment for year. Subtract line 18 from line 15. If zero or less, stop here; you do not owe the penalty. Do not file Form 2210 unless you checked box 1d above	19	
20	Multiply line 19 by .03713	20	
21	• If the amount on line 19 was paid on or after 4/15/03, enter -0-. • If the amount on line 19 was paid before 4/15/03, make the following computation to find the amount to enter on line 21.	21	
	Amount on line 19 X Number of days paid before 4/15/03 X .00014	21	
22	Penalty. Subtract line 21 from line 20. Enter the result here and on Form 1040, line 74; Form 1040A, line 48; Form 1040NR, line 73; Form 1040NR-EZ, line 26; or Form 1041, line 26, but do not file Form 2210 unless you checked one or more of the boxes in Part I above	22	

For Paperwork Reduction Act Notice, see page 6 of separate instructions.

Form 2210 (2002)

**Part IV** Regular Method (See page 3 of the instructions if you are filing Form 1040NR or 1040NR-EZ)

Section A - Figure Your Underpayment	Payment Due Dates			
	(a) 4/15/02	(b) 6/15/02	(c) 9/15/02	(d) 1/15/03
<b>23</b> Required installments. If box 1b applies, enter the amounts from Schedule AI, line 25. Otherwise, enter 25% (.25) of line 15, Form 2210, in each column.	23 76,751.	76,751.	76,751.	76,750.
<b>24</b> Estimated tax paid and tax withheld (see page 3 of the instructions). For column (a) only, also enter the amount from line 24 on line 28. If line 24 is equal to or more than line 23 for all payment periods, stop here; you do not owe the penalty. Do not file Form 2210 unless you checked a box in Part I. <i>Complete lines 25 through 31 of one column before going to the next column.</i>	24 * 161,173.	84,600.	89,400.	101,799.
<b>25</b> Enter amount, if any, from line 31 of previous column.	25			
<b>26</b> Add lines 24 and 25.	26			
<b>27</b> Add amounts on lines 29 and 30 of the previous column.	27			
<b>28</b> Subtract line 27 from line 26. If zero or less, enter -0-. For column (a) only, enter the amount from line 24.	28			
<b>29</b> If the amount on line 28 is zero, subtract line 26 from line 27. Otherwise, enter -0-.	29			
<b>30</b> Underpayment. If line 23 is equal to or more than line 28, subtract line 28 from line 23. Then go to line 25 of next column. Otherwise, go to line 31.	30			
<b>31</b> Overpayment. If line 28 is more than line 23, subtract line 23 from line 28. Then go to line 25 of next column.	31			

**Section B - Figure the Penalty** (Complete lines 32 through 35 of one column before going to the next column.)

Rate Period 1 April 16, 2002 - December 31, 2002	4/15/02	6/15/02	9/15/02	
<b>32</b> Number of days from the date shown above line 32 to the date the amount on line 30 was paid or 12/31/02, whichever is earlier.	Days:	Days:	Days:	
<b>33</b> Underpayment on line 30. Number of (see page 4 of the instructions) x days on line 32 x .06	33 \$	\$	\$	
Rate Period 2 January 1, 2003 - April 15, 2003	12/31/02	12/31/02	12/31/02	1/15/03
	Days:	Days:	Days:	Days:
	34			
<b>35</b> Underpayment on line 30. Number of (see page 5 of the instructions) x days on line 34 x .05	35 \$	\$	\$	\$
<b>6</b> Penalty. Add all amounts on lines 33 and 35 in all columns. Enter the total here and on Form 1040, line 74; Form 1040A, line 48; Form 1040NR, line 73; Form 1040NR-EZ, line 26; or Form 1041, line 25, but do not file Form 2210 unless you checked one or more of the boxes in Part I.				36 \$ NONE

Form 2210 (2002)

\*INCLUDES 2001 OVERPAYMENT OF \$ 20,527. APPLIED AT 4-15-2002.

(Form 1040)

# Schedule A - Itemized Deductions

(Schedule B is on back)

Department of the Treasury  
Internal Revenue Service (99)

▶ Attach to Form 1040. ▶ See Instructions for Schedules A and B (Form 1040).

**2002**

Attachment  
Sequence No. 07

Name(s) shown on Form 1040

Your social security number

**RICHARD B CHENEY & LYNNE V CHENEY**

<b>Medical and Dental Expenses</b>	<b>Caution.</b> Do not include expenses reimbursed or paid by others.		
1	Medical and dental expenses (see page A-2)	1	
2	Enter amount from Form 1040, line 36	2	
3	Multiply line 2 by 7.5% (.075)	3	
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4	
<b>Taxes You Paid</b>	5 State and local income taxes	5	
(See page A-2.)	6 Real estate taxes (see page A-2)	6	6,381
	7 Personal property taxes	7	
	8 Other taxes. List type and amount ▶	8	
	9 Add lines 5 through 8	9	6,381
<b>Interest You Paid</b>	10 Home mortgage interest and points reported to you on Form 1098	10	
(See page A-3.)	11 Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see page A-3 and show that person's name, identifying no., and address ▶	11	
	12 Points not reported to you on Form 1098. See page A-3 for special rules	12	
	13 Investment interest. Attach Form 4952 if required. (See page A-3.)	13	
	14 Add lines 10 through 13	14	
<b>Gifts to Charity</b>	15 Gifts by cash or check. If you made any gift of \$250 or more, see page A-4	15	121,420
If you made a gift and got a benefit for it, see page A-4.	16 Other than by cash or check. If any gift of \$250 or more, see page A-4. You must attach Form 8283 if over \$500	16	563
	17 Carryover from prior year	17	
	18 Add lines 15 through 17	18	121,983
<b>Casualty and Theft Losses</b>	19 Casualty or theft loss(es). Attach Form 4684. (See page A-5)	19	
<b>Job Expenses and Most Other Miscellaneous Deductions</b>	20 Unreimbursed employee expenses - job travel, union dues, job education, etc. You must attach Form 2106 or 2106-EZ if required. (See page A-5.) ▶	20	
(See page A-5 for expenses to deduct here.)	21 Tax preparation fees	21	
	22 Other expenses- investment, safe deposit box, etc. List type and amount ▶	22	SEE STATEMENT 5
	23 Add lines 20 through 22	23	147,538
	24 Enter amount from Form 1040, line 36	24	1,166,735
	25 Multiply line 24 by 2% (.02)	25	23,335
	26 Subtract line 25 from line 23. If line 25 is more than line 23, enter -0-	26	124,203
<b>Other Miscellaneous Deductions</b>	27 Other- from list on page A-6. List type and amount ▶	27	
<b>Total Itemized Deductions</b>	28 Is Form 1040, line 36, over \$137,300 (over \$68,650 if married filing separately)? <input type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 27. Also, enter this amount on Form 1040, line 38. <input checked="" type="checkbox"/> Yes. Your deduction may be limited. See page A-6 for the amount to enter.	28	221,684 SEE STMT 6

For Paperwork Reduction Act Notice, see Form 1040 Instructions.

Schedule A (Form 1040) 2002



Schedules A&amp;B (Form 1040) 2002

No. 1545-0074

Page

Name(s) shown on Form 1040. Do not enter name and social security number if shown on other side.

Your social security numt

**RICHARD B CHENEY & LYNNE V CHENEY****Schedule B - Interest and Ordinary Dividends**Attachment  
Sequence No. 08**Part I  
Interest**(See page B-1  
and the  
instructions for  
Form 1040,  
line 8a.)Note. If you  
received a Form  
1099-INT, Form  
1099-OID, or  
substitute  
statement from  
a brokerage firm,  
list the firm's  
name as the  
payer and enter  
the total interest  
shown on that  
form.

- 1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see page B-1 and list this interest first. Also, show that buyer's social security number and address ▶

JACKSON STATE BANK AND TRUST  
NORTHERN TRUST BANK OF TEXAS**Amount**1,938.  
3,425.

1

- 2 Add the amounts on line 1. . . . .
- 
- 3 Excludable interest on series EE and I U.S. savings bonds issued after 1989 from Form 8815, line 14. You must attach Form 8815 . . . . .
- 
- 4 Subtract line 3 from line 2. Enter the result here and on Form 1040, line 8a . . . ▶

2 5,363.  
3  
4 5,363.

Note. If line 4 is over \$1,500, you must complete Part III.

**Part II  
Ordinary  
Dividends**(See page B-1  
and the  
instructions for  
Form 1040,  
line 9.)Note. If you  
received a Form  
1099-DIV or  
substitute  
statement from  
a brokerage firm,  
list the firm's  
name as the  
payer and enter  
the ordinary  
dividends shown  
on that form.

- 5 List name of payer. Include only ordinary dividends. If you received any capital gain distributions, see the instructions for Form 1040, line 13 ▶

GMO REAL ESTATE FUND  
GMO TAX MANAGED SMALL COMPANIES III  
GMO TAX MANAGED US EQUITY III  
GMO VALUE FUND III  
LAZARD FRERES & CO  
MORGAN STANLEY  
READER'S DIGEST  
VANGUARD INTER-TERM TAX-EXEMPT ADM  
VANGUARD INTER-TERM TREASURY ADM**Amount**25,455.  
3,877.  
14,124.  
5,512.  
7,436.  
236.  
1,120.  
1,092.  
432,147.

5

- 6 Add the amounts on line 5. Enter the total here and on Form 1040, line 9 . . . ▶

6 490,999.

Note. If line 6 is over \$1,500, you must complete Part III.

**Part III  
Foreign  
Accounts  
and Trusts**(See  
page B-2.)

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; OR (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

Yes No

- 7a At any time during 2002, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? See page B-2 for exceptions and filing requirements for Form TD F 90-22.1 . . . . .

X

- b If "Yes," enter the name of the foreign country ▶

- 8 During 2002, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See page B-2 . . . . .

X

For Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule B (Form 1040) 2002



**SCHEDULE C  
(Form 1040)****Profit or Loss From Business**

(Sole Proprietorship)

▶ Partnerships, joint ventures, etc., must file Form 1065 or 1065-B.

▶ Attach to Form 1040 or 1041.

▶ See instructions for Schedule C (Form 1040).

OMB No. 1545-

**2001**Attachment  
Sequence No. 09Department of the Treasury  
Internal Revenue Service (99)

Name of proprietor

**LYNNE V CHENEY**

Social security number (SSN)

**A** Principal business or profession, including product or service (see page C-1 of the instructions)**B** Enter code from pages C-7, 8 & 9**CONSULTING**▶ **541990****C** Business name. If no separate business name, leave blank.**D** Employer ID number (EIN). If any**LYNNE V CHENEY****E** Business address (including suite or room no.) ▶

City, town or post office, state, and ZIP code

**F** Accounting method: (1) ☒ Cash (2) ☐ Accrual (3) ☐ Other (specify) ▶**G** Did you "materially participate" in the operation of this business during 2002? If "No," see page C-3 for limit on losses ☒ Yes ☐ No**H** If you started or acquired this business during 2002, check here ▶**Part I Income**

<b>1</b> Gross receipts or sales. <b>Caution.</b> If this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked, see page C-2 and check here <b>STMT. 7.</b> ▶ <input type="checkbox"/>	<b>1</b>	<b>147,187.</b>
<b>2</b> Returns and allowances	<b>2</b>	
<b>3</b> Subtract line 2 from line 1	<b>3</b>	<b>147,187.</b>
<b>4</b> Cost of goods sold (from line 42 on page 2)	<b>4</b>	
<b>5</b> <b>Gross profit.</b> Subtract line 4 from line 3	<b>5</b>	<b>147,187.</b>
<b>6</b> Other income, including Federal and state gasoline or fuel tax credit or refund (see page C-3)	<b>6</b>	
<b>7</b> <b>Gross income.</b> Add lines 5 and 6	<b>7</b>	<b>147,187.</b>

**Part II Expenses. Enter expenses for business use of your home only on line 30.**

<b>8</b> Advertising	<b>8</b>		<b>19</b> Pension and profit-sharing plans	<b>19</b>	
<b>9</b> Bad debts from sales or services (see page C-3)	<b>9</b>		<b>20</b> Rent or lease (see page C-5):		
<b>10</b> Car and truck expenses (see page C-3)	<b>10</b>		<b>a</b> Vehicles, machinery, and equipment	<b>20a</b>	
<b>11</b> Commissions and fees	<b>11</b>		<b>b</b> Other business property	<b>20b</b>	
<b>12</b> Depletion	<b>12</b>		<b>21</b> Repairs and maintenance	<b>21</b>	
<b>13</b> Depreciation and section 179 expense deduction (not included in Part III) (see page C-4)	<b>13</b>		<b>22</b> Supplies (not included in Part III)	<b>22</b>	
<b>14</b> Employee benefit programs (other than on line 19)	<b>14</b>		<b>23</b> Taxes and licenses	<b>23</b>	
<b>15</b> Insurance (other than health)	<b>15</b>		<b>24</b> Travel, meals, and entertainment:		
<b>16</b> Interest:			<b>a</b> Travel	<b>24a</b>	
<b>a</b> Mortgage (paid to banks, etc.)	<b>16a</b>		<b>b</b> Meals and entertainment		
<b>b</b> Other	<b>16b</b>		<b>c</b> Enter nondeductible amount included on line 24b (see page C-5)		
<b>17</b> Legal and professional services	<b>17</b>		<b>d</b> Subtract line 24c from line 24b	<b>24d</b>	
<b>18</b> Office expense	<b>18</b>		<b>25</b> Utilities	<b>25</b>	
			<b>26</b> Wages (less employment credits)	<b>26</b>	
			<b>27</b> Other expenses (from line 48 on page 2)	<b>27</b>	<b>18,111.</b>

**28** **Total expenses before expenses for business use of home.** Add lines 8 through 27 in columns ▶ **28** **18,111.****29** Tentative profit (loss). Subtract line 28 from line 7 **29** **129,076.****30** Expenses for business use of your home. Attach Form 8829 **30****31** **Net profit or (loss).** Subtract line 30 from line 29.

• If a profit, enter on Form 1040, line 12, and also on Schedule SE, line 2 (statutory employees, see page C-6). Estates and trusts, enter on Form 1041, line 3.

• If a loss, you must go to line 32.

**32** If you have a loss, check the box that describes your investment in this activity (see page C-6).

• If you checked 32a, enter the loss on Form 1040, line 12, and also on Schedule SE, line 2 (statutory employees, see page C-6). Estates and trusts, enter on Form 1041, line 3.

• If you checked 32b, you must attach Form 6198.

**32a** ☒ All investment is at risk.  
**32b** ☐ Some investment is not at risk.

**31** **129,076.**

**Part III Cost of Goods Sold** (see page C-6)

<b>33</b> Method(s) used to value closing inventory:	<b>a</b> <input type="checkbox"/> Cost	<b>b</b> <input type="checkbox"/> Lower of cost or market	<b>c</b> <input type="checkbox"/> Other (attach explanation)
<b>34</b> Was there any change in determining quantities, costs, or valuations between opening and closing inventory? If "Yes," attach explanation			
<div style="text-align: right;"><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No</div>			
<b>35</b> Inventory at beginning of year. If different from last year's closing inventory, attach explanation	<b>35</b>		
<b>36</b> Purchases less cost of items withdrawn for personal use	<b>36</b>		
<b>37</b> Cost of labor. Do not include any amounts paid to yourself	<b>37</b>		
<b>38</b> Materials and supplies	<b>38</b>		
<b>39</b> Other costs	<b>39</b>		
<b>40</b> Add lines 35 through 39	<b>40</b>		
<b>41</b> Inventory at end of year	<b>41</b>		
<b>42</b> Cost of goods sold. Subtract line 41 from line 40. Enter the result here and on page 1, line 4	<b>42</b>		

**Part IV Information on Your Vehicle.** Complete this part only if you are claiming car or truck expenses on line 10 and are not required to file Form 4562 for this business. See the instructions for line 13 on page C-3 to find out if you must file.

<b>3</b> When did you place your vehicle in service for business purposes? (month, day, year) ▶	
<b>4</b> Of the total number of miles you drove your vehicle during 2002, enter the number of miles you used your vehicle for:	
<b>a</b> Business	<b>b</b> Commuting
<b>c</b> Other	
<b>5</b> Do you (or your spouse) have another vehicle available for personal use?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>6</b> Was your vehicle available for personal use during off-duty hours?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>7 a</b> Do you have evidence to support your deduction?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>b</b> If "Yes," is the evidence written?	<input type="checkbox"/> Yes <input type="checkbox"/> No

**Part V Other Expenses.** List below business expenses not included on lines 8-26 or line 30.

<b>TAX PREPARATION, PLANNING, AND REPRESENTATION FEES</b>	<b>7,988.</b>
<b>PROFESSIONAL FEES</b>	<b>10,123.</b>
<b>Total other expenses. Enter here and on page 1, line 27</b>	<b>18,111.</b>

**SCHEDULE D  
(Form 1040)****Capital Gains and Losses**

OMB No. 1545-007

**2002**Attachment  
Sequence No. 12Department of the Treasury  
Internal Revenue Service (99)

▶ Attach to Form 1040.

▶ See Instructions for Schedule D (Form 1040).

▶ Use Schedule D-1 to list additional transactions for lines 1 and 8.

Name(s) shown on Form 1040

Your social security number

**RICHARD B CHENEY & LYNNE V CHENEY****Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold (Mo., day, yr.)	(d) Sales price (see page D-5 of the instructions)	(e) Cost or other basis (see page D-5 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)
1 141,945.095 SHS OF QMO VALUTE FUND III	VARIOUS	06/27/2002	1,156,853	1,253,654	-96,801
2 Enter your short-term totals, if any, from Schedule D-1, line 2		2			
3 Total short-term sales price amounts. Add lines 1 and 2 in column (d)		3	1,156,853		
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824				4	
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				5	
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your 2001 Capital Loss Carryover Worksheet				6	43,977
7 Net short-term capital gain or (loss). Combine lines 1 through 6 in column (f)				7	-140,778

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold (Mo., day, yr.)	(d) Sales price (see page D-5 of the instructions)	(e) Cost or other basis (see page D-5 of the instructions)	(f) Gain or (loss) Subtract (e) from (d)	(g) 28% rate gain or (loss) * (see instr. below)
8 5,512.104 SHS OF QMO REAL ESTATE FUND	09/05/2001	12/23/2002	59,200	60,964	-1,764	
9,775.510 SHS OF VANG SE-TERM TAX-EXPT	VARIOUS	05/01/2002	1,000,000	997,251	2,749	
9 Enter your long-term totals, if any, from Schedule D-1, line 9		9				
10 Total long-term sales price amounts. Add lines 8 and 9 in column (d)		10	1,059,200			
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824				11		
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1				12		
13 Capital gain distributions. See page D-1 of the instructions				13	142,592	
14 Long-term capital loss carryover. Enter in both columns (f) and (g) the amount, if any, from line 13 of your 2001 Capital Loss Carryover Worksheet				14		
Combine lines 8 through 14 in column (g)				15		
16 Net long-term capital gain or (loss). Combine lines 8 through 14 in column (f)				16	143,577	

Next: Go to Part III on the back.

\* 1% rate gain or loss includes all "collectibles gains and losses" (as defined on page D-6 of the instructions) and up to 50% of the eligible  
on qualified small business stock (see page D-4 of the instructions).

Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule D (Form 1040) 2002

**Part III Taxable Gain or Deductible Loss**

<b>17</b> Combine lines 7 and 16 and enter the result. If a loss, go to line 18. If a gain, enter the gain on Form 1040, line 13, and complete Form 1040 through line 41 . . . . .	<b>17</b>	<b>2,799.</b>
<b>Next:</b> • If both lines 16 and 17 are gains and Form 1040, line 41, is more than zero, complete Part IV below. • Otherwise, skip the rest of Schedule D and complete Form 1040.		
<b>18</b> If line 17 is a loss, enter here and on Form 1040, line 13, the smaller of (a) that loss or (b) (\$3,000) (or, if married filing separately, (\$1,500)). Then complete Form 1040 through line 39 . . . . .	<b>18</b>	
<b>Next:</b> • If the loss on line 17 is more than the loss on line 18 or if Form 1040, line 39, is less than zero, skip Part IV below and complete the Capital Loss Carryover Worksheet on page D-6 of the instructions before completing the rest of Form 1040. • Otherwise, skip Part IV below and complete the rest of Form 1040.		

**Part IV Tax Computation Using Maximum Capital Gains Rates**

<b>19</b> Enter your unrecaptured section 1250 gain, if any, from line 17 of the worksheet on page D-7 of the instructions . . . . .	<b>19</b>	
If line 15 or line 19 is more than zero, complete the worksheet on page D-9 of the instructions to figure the amount to enter on lines 22, 29, and 40 below, and skip all other lines below. Otherwise, go to line 20.		
<b>20</b> Enter your taxable income from Form 1040, line 41 . . . . .	<b>20</b>	<b>945,051.</b>
<b>21</b> Enter the smaller of line 16 or line 17 of Schedule D . . . . .	<b>21</b>	<b>2,799.</b>
<b>22</b> If you are deducting investment interest expense on Form 4952, enter the amount from Form 4952, line 4e. Otherwise, enter -0- . . . . .	<b>22</b>	
<b>23</b> Subtract line 22 from line 21. If zero or less, enter -0- . . . . .	<b>23</b>	<b>2,799.</b>
<b>24</b> Subtract line 23 from line 20. If zero or less, enter -0- . . . . .	<b>24</b>	<b>942,252.</b>
<b>25</b> Figure the tax on the amount on line 24. Use the Tax Table or Tax Rate Schedules, whichever applies . . . . .	<b>25</b>	<b>334,468.</b>
<b>26</b> Enter the smaller of: • The amount on line 20 or • \$46,700 if married filing jointly or qualifying widow(er); \$27,950 if single; \$37,450 if head of household; or \$23,350 if married filing separately . . . . .	<b>26</b>	<b>46,700.</b>
If line 26 is greater than line 24, go to line 27. Otherwise, skip lines 27 through 33 and go to line 34.		
<b>27</b> Enter the amount from line 24 . . . . .	<b>27</b>	
<b>28</b> Subtract line 27 from line 26. If zero or less, enter -0- and go to line 34 . . . . .	<b>28</b>	
<b>29</b> Enter your qualified 5-year gain, if any, from line 8 of the worksheet on page D-8 . . . . .	<b>29</b>	
<b>30</b> Enter the smaller of line 28 or line 29 . . . . .	<b>30</b>	
<b>31</b> Multiply line 30 by 8% (.08) . . . . .	<b>31</b>	
<b>32</b> Subtract line 30 from line 28 . . . . .	<b>32</b>	
<b>33</b> Multiply line 32 by 10% (.10) . . . . .	<b>33</b>	
If the amounts on lines 23 and 28 are the same, skip lines 34 through 37 and go to line 38.		
<b>34</b> Enter the smaller of line 20 or line 23 . . . . .	<b>34</b>	<b>2,799.</b>
<b>35</b> Enter the amount from line 28 (if line 28 is blank, enter -0-) . . . . .	<b>35</b>	
<b>36</b> Subtract line 35 from line 34 . . . . .	<b>36</b>	<b>2,799.</b>
<b>37</b> Multiply line 36 by 20% (.20) . . . . .	<b>37</b>	<b>560.</b>
<b>38</b> Add lines 25, 31, 33, and 37 . . . . .	<b>38</b>	<b>335,028.</b>
<b>39</b> Figure the tax on the amount on line 20. Use the Tax Table or Tax Rate Schedules, whichever applies . . . . .	<b>39</b>	<b>335,549.</b>
<b>40</b> Tax on all taxable income (including capital gains). Enter the smaller of line 38 or line 39 here and on Form 1040, line 42 . . . . .	<b>40</b>	<b>335,028.</b>

**SCHEDULE E  
(Form 1040)****Supplemental Income and Loss**(From rental real estate, royalties, partnerships,  
S corporations, estates, trusts, REMICs, etc.)

OMB No. 1545-0074

**2002**Attachment  
Sequence No. **13**Department of the Treasury  
Internal Revenue Service (99)

▶ Attach to Form 1040 or Form 1041. ▶ See instructions for Schedule E (Form 1040).

Name(s) shown on return

Your social security number

**RICHARD B CHENEY & LYNNE V CHENEY****Part I Income or Loss From Rental Real Estate and Royalties** Note. If you are in the business of renting personal property, use

Schedule C or C-EZ (see page E-3). Report farm rental income or loss from Form 4835 on page 2, line 39.

<b>1</b>	<b>Show the kind and location of each rental real estate property:</b>	<b>2</b>	<b>For each rental real estate property listed on line 1, did you or your family use it during the tax year for personal purposes for more than the greater of:</b>	<b>Yes</b>	<b>No</b>
<b>A</b>	<b>SIMON &amp; SCHUSTER, INC.</b>				
	<b>(BOOK ROYALTY PAID TO MRS. CHENEY</b>				
<b>B</b>	<b>AND DONATED TO CHARITY ON A</b>				
	<b>TAX NEUTRAL BASIS)</b>				
<b>C</b>	<b>REFUND OF ADVANCE BOOK ROYALTY</b>				
	<b>ORIGINALLY RECEIVED IN 2000</b>				

Income:		Properties			Totals (Add columns A, B, and C.)
		A	B	C	
<b>3</b>	Rents received	<b>3</b>			<b>3</b>
<b>4</b>	Royalties received	<b>4</b>	125,000.	-10,000.	<b>4</b> 115,000.
<b>Expenses:</b>					
<b>5</b>	Advertising	<b>5</b>			
<b>6</b>	Auto and travel (see page E-4)	<b>6</b>			
<b>7</b>	Cleaning and maintenance	<b>7</b>			
<b>8</b>	Commissions	<b>8</b>			
<b>9</b>	Insurance	<b>9</b>			
<b>10</b>	Legal and other professional fees	<b>10</b>			
<b>11</b>	Management fees	<b>11</b>			
<b>12</b>	Mortgage interest paid to banks, etc. (see page E-4)	<b>12</b>			<b>12</b>
<b>13</b>	Other interest	<b>13</b>			
<b>14</b>	Repairs	<b>14</b>			
<b>15</b>	Supplies	<b>15</b>			
<b>16</b>	Taxes	<b>16</b>			
<b>17</b>	Utilities	<b>17</b>			
<b>18</b>	Other (list) ▶ <b>SEE EXPENSE STMT.</b>	<b>18</b>	1,876.		
<b>19</b>	Add lines 5 through 18	<b>19</b>	1,876.		<b>19</b> 1,876.
<b>20</b>	Depreciation expense or depletion (see page E-4)	<b>20</b>	3,518.		<b>20</b> 3,518.
<b>21</b>	Total expenses. Add lines 19 and 20	<b>21</b>	5,394.		
<b>22</b>	Income or (loss) from rental real estate or royalty properties. Subtract line 21 from line 3 (rents) or line 4 (royalties). If the result is a (loss), see page E-5 to find out if you must file Form 6198	<b>22</b>	119,606.	-10,000.	
<b>23</b>	Deductible rental real estate loss. Caution. Your rental real estate loss on line 22 may be limited. See page E-5 to find out if you must file Form 8582. Real estate professionals must complete line 42 on page 2	<b>23</b>			
<b>24</b>	Income. Add positive amounts shown on line 22. Do not include any losses	<b>24</b>			119,606.
<b>25</b>	Losses. Add royalty losses from line 22 and rental real estate losses from line 23. Enter total losses here	<b>25</b>			10,000.
<b>26</b>	Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 39 on page 2 do not apply to you, also enter this amount on Form 1040, line 17. Otherwise, include this amount in the total on line 40 on page 2	<b>26</b>			109,606.

For Paperwork Reduction Act Notice, see Form 1040 Instructions.

Schedule E (Form 1040) 2002

Schedule SE (Form 1040) 2002

Attachment Sequence Number

Page

Name of person with self-employment income (as shown on Form 1040)

LYNNE V CHENEY

Social security number of person with self-employment income

## Section B - Long Schedule SE

## Part I Self-Employment Tax

**Note.** If your only income subject to self-employment tax is church employee income, skip lines 1 through 4b. Enter -0- on line 4c and go to line 5a. Income from services you performed as a minister or a member of a religious order is not church employee income. See page SE-1.

- A If you are a minister, member of a religious order, or Christian Science practitioner and you filed Form 4361, but you had \$400 or more of other net earnings from self-employment, check here and continue with Part I ☐

1	Net farm profit or (loss) from Schedule F, line 36, and farm partnerships, Schedule K-1 (Form 1065), line 15a. <b>Note.</b> Skip this line if you use the farm optional method. See page SE-3.	1	
2	Net profit or (loss) from Schedule C, line 31; Schedule C-EZ, line 3; Schedule K-1 (Form 1065), line 15a (other than farming); and Schedule K-1 (Form 1065-B), box 9. Ministers and members of religious orders, see page SE-1 for amounts to report on this line. See page SE-2 for other income to report. <b>Note.</b> Skip this line if you use the nonfarm optional method. See page SE-4.	2	248,682.
3	Combine lines 1 and 2. <b>SEE STATEMENT 10.</b>	3	248,682.
4a	If line 3 is more than zero, multiply line 3 by 92.35% (.9235). Otherwise, enter amount from line 3.	4a	229,658.
b	If you elect one or both of the optional methods, enter the total of lines 15 and 17 here.	4b	
c	Combine lines 4a and 4b. If less than \$400, do not file this schedule; you do not owe self-employment tax. <b>Exception.</b> If less than \$400 and you had church employee income, enter -0- and continue.	4c	229,658.
5a	Enter your church employee income from Form W-2. <b>Caution.</b> See page SE-1 for definition of church employee income.	5a	
b	Multiply line 5a by 92.35% (.9235). If less than \$100, enter -0-.	5b	
6	Net earnings from self-employment. Add lines 4c and 5b.	6	229,658.
7	Maximum amount of combined wages and self-employment earnings subject to social security tax or the 6.2% portion of the 7.65% railroad retirement (tier 1) tax for 2002.	7	84,900.00
8a	Total social security wages and tips (total of boxes 3 and 7 on Form(s) W-2) and railroad retirement (tier 1) compensation.	8a	80,000.
b	Unreported tips subject to social security tax (from Form 4137, line 9).	8b	
c	Add lines 8a and 8b.	8c	80,000.
9	Subtract line 8c from line 7. If zero or less, enter -0- here and on line 10 and go to line 11.	9	4,900.
10	Multiply the smaller of line 6 or line 9 by 12.4% (.124).	10	608.
11	Multiply line 6 by 2.9% (.029).	11	6,660.
12	Self-employment tax. Add lines 10 and 11. Enter here and on Form 1040, line 56.	12	7,268.
13	Deduction for one-half of self-employment tax. Multiply line 12 by 50% (.5). Enter the result here and on Form 1040, line 29.	13	3,634.

## Part II Optional Methods To Figure Net Earnings (See page SE-3.)

**Farm Optional Method.** You may use this method only if:

- Your gross farm income<sup>1</sup> was not more than \$2,400, or
- Your net farm profits<sup>2</sup> were less than \$1,733.

14	Maximum income for optional methods.	14	1,600.00
15	Enter the smaller of: two-thirds (2/3) of gross farm income <sup>1</sup> (not less than zero) or \$1,600. Also include this amount on line 4b above.	15	

**Nonfarm Optional Method.** You may use this method only if:

- Your net nonfarm profits<sup>3</sup> were less than \$1,733 and also less than 72.189% of your gross nonfarm income,<sup>4</sup> and
- You had net earnings from self-employment of at least \$400 in 2 of the prior 3 years.

**Caution.** You may use this method no more than five times.

16	Subtract line 15 from line 14.	16	
17	Enter the smaller of: two-thirds (2/3) of gross nonfarm income (not less than zero) or the amount on line 16. Also include this amount on line 4b above.	17	

<sup>1</sup> From Sch. F, line 11, and Sch. K-1 (Form 1065), line 15b.

<sup>3</sup> From Sch. C, line 31; Sch. C-EZ, line 3; Sch. K-1 (Form 1065), line 15a; and Sch. K-1 (Form 1065-B), box 9.

<sup>2</sup> From Sch. F, line 36, and Sch. K-1 (Form 1065), line 15a.

<sup>4</sup> From Sch. C, line 7; Sch. C-EZ, line 1; Sch. K-1 (Form 1065), line 15c; and Sch. K-1 (Form 1065-B), box 9.



1116

## Foreign Tax Credit

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040NR, 1041, or 990-T.

▶ See separate instructions.

OMB No. 1545-012

2002

Attachment  
Sequence No. 19Department of the Treasury  
Internal Revenue Service (99)Name **RICHARD B CHENEY**  
**LYNNE V CHENEY**Identifying number as shown on page 1 of your tax return  
[REDACTED]

Use a separate Form 1116 for each category of income listed below. See Categories of Income on page 3 of the instructions. Check only one box on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- ☒ Passive income  
☐ High withholding tax interest  
☐ Financial services income
- ☐ Shipping income  
☐ Dividends from a DISC or former DISC  
☐ Certain distributions from a foreign sales corporation (FSC) or former FSC
- ☐ Lump-sum distributions  
☐ Section 901(j) income  
☐ Certain income re-sourced by treaty  
☐ General limitation income

Resident of (name of country) ▶ **UNITED STATES**

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

**Part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)**

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
Enter the name of the foreign country or U.S. possession . . . . .	VARIOUS COUNTRIES			
1 Gross income from sources within country shown above and of the type checked above (see page 7 of the instructions):	7,436.			7,436.
2 Deductions and losses (Caution: See pages 9, 12, and of the instructions):				
Expenses definitely related to the income on line 1 (attach statement) . . . . .	NONE			
Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction. See instructions . . . . .	221,684.			
b Other deductions (attach statement) . . . . .				
c Add lines 3a and 3b . . . . .	221,684.			
d Gross foreign source income (see instructions) . . . . .	7,436.			
e Gross income from all sources (see instructions) . . . . .	1,895,877.			
f Divide line 3d by line 3e (see instructions) . . . . .	0.00392220			
g Multiply line 3c by line 3f . . . . .	869.			
h Pro rata share of interest expense (see instructions):				
i Home mortgage interest (use worksheet on page 12 of the instructions) . . . . .				
j Other interest expense . . . . .				
k Losses from foreign sources . . . . .				
l Add lines 2, 3g, 4a, 4b, and 5 . . . . .	869.			869.
Subtract line 6 from line 1. Enter the result here and on line 14, page 2 . . . . .				6,567.

**Part II Foreign Taxes Paid or Accrued (See page 13 of the instructions)**

Credit is claimed for taxes (you must check one)	Foreign taxes paid or accrued							
	In foreign currency				In U.S. dollars			
	Taxes withheld at source on:			(s) Other foreign taxes paid or accrued	Taxes withheld at source on:			(w) Other foreign taxes paid or accrued
(m) <input type="checkbox"/> Paid	(p) Dividends	(q) Rents and royalties	(r) Interest		(t) Dividends	(u) Rents and royalties	(v) Interest	
(n) <input checked="" type="checkbox"/> Accrued								
(o) Date paid or accrued								
08/22/2002					2,052.			2,052.

Add lines A through C, column (x). Enter the total here and on line 9, page 2 . . . . .

2,052.

Paperwork Reduction Act Notice, see page 16 of the instructions.

1,000 JSA

Form 1116 (2002)

Form 1116 (2002) **RICHARD B CHENEY & LYNNE V CHENEY**

Page

**Part III Figuring the Credit**

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I . . . . .	9	2,052.	
10	Carryback or carryover (attach detailed computation) . . . . .	10		
11	Add lines 9 and 10 . . . . .	11	2,052.	
12	Reduction in foreign taxes. (see page 13 of the instructions). . . . .	12		
13	Subtract line 12 from line 11. This is the total amount of foreign taxes available for credit . . . . .	13	2,052.	
14	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. (see page 14 of the instructions). . . . .	14	6,567.	
15	Adjustments to line 14. (see page 14 of the instructions). . . . .	15		
16	Combine the amounts on lines 14 and 15. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 17 through 21. However, if you are filing more than one Form 1116, you must complete line 19.) . . . . .	16	6,567.	
17	<b>Individuals:</b> Enter the amount from Form 1040, line 39. If you are a nonresident alien, enter the amount from Form 1040NR, line 37. <b>Estates and trusts:</b> Enter your taxable income without the deduction for your exemption. . . . . <b>SEE STATEMENT 12</b> . . . . .	17	943,702.	
<b>Caution:</b> If you figured your tax using the special rates on capital gains, see page 15 of the instructions.				
18	Divide line 16 by line 17. If line 16 is more than line 17, enter "1". . . . .	18	0.00695876	
19	<b>Individuals:</b> Enter the amount from Form 1040, line 42. If you are a nonresident alien, enter the amount from Form 1040NR, line 40. <b>Estates and trusts:</b> Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37. . . . .	19	335,028.	
<b>Caution:</b> If you are completing line 19 for separate category g (lump-sum distributions), see page 15 of the instructions.				
20	Multiply line 19 by line 18 (maximum amount of credit) . . . . .	20	2,331.	
21	Enter the smaller of line 13 or line 20. If this is the only Form 1116 you are filing, skip lines 22 through 30 and enter this amount on line 31. Otherwise, complete the appropriate line in Part IV (see page 16 of the instructions). . . . .	21	2,052.	

**Part IV Summary of Credits From Separate Parts III (see page 16 of the instructions)**

22	Credit for taxes on passive income . . . . .	22		
23	Credit for taxes on high withholding tax interest . . . . .	23		
24	Credit for taxes on financial services income . . . . .	24		
25	Credit for taxes on shipping income . . . . .	25		
26	Credit for taxes on dividends from a DISC or former DISC and certain distributions from a FSC or former FSC . . . . .	26		
27	Credit for taxes on lump-sum distributions . . . . .	27		
28	Credit for taxes on certain income re-sourced by treaty . . . . .	28		
29	Credit for taxes on general limitation income . . . . .	29		
30	Add lines 22 through 29 . . . . .	30		
31	Enter the smaller of line 19 or line 30 . . . . .	31	2,052.	
32	Reduction of credit for international boycott operations. See instructions for line 12 on page 13 . . . . .	32		
33	Subtract line 32 from line 31. This is your foreign tax credit. Enter here and on Form 1040, line 45; Form 1040NR, line 43; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a . . . . .	33	2,052.	

1116

## Foreign Tax Credit

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040NR, 1041, or 990-T.

▶ See separate instructions.

OMB NO. 1545-0047

2002

Attachment  
Sequence No. 15Department of the Treasury  
Internal Revenue Service (99)

RICHARD B CHENEY

Identifying number as shown on page 1 of your tax return

LYNNE V CHENEY

File a separate Form 1116 for each category of income listed below. See Categories of Income on page 3 of the instructions. Check only one on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

- |  |   |  |
|--|---|--|
| <input checked="" type="checkbox"/> Passive income     | <input type="checkbox"/> Shipping income  | <input type="checkbox"/> Lump-sum distributions              |
| <input type="checkbox"/> High withholding tax interest | <input type="checkbox"/> Dividends from a DISC or former DISC                                       | <input type="checkbox"/> Section 901(j) income               |
| <input type="checkbox"/> Financial services income     | <input type="checkbox"/> Certain distributions from a foreign sales corporation (FSC) or former FSC | <input type="checkbox"/> Certain income re-sourced by treaty |
|  |   | <input type="checkbox"/> General limitation income           |

## ALTERNATIVE MINIMUM TAX

Resident of (name of country) ▶ UNITED STATES

Note: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

## Part I Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)

	Foreign Country or U.S. Possession			Total (Add cols. A, B, and C.)
	A	B	C	
1 Enter the name of the foreign country or U.S. possession. . . . . ▶	VARIOUS COUNTRIES			
2 Gross income from sources within country shown above and of the type checked above (see page 7 of the instructions): . . . . .				
	7,436.			7,436.
3 Deductions and losses (Caution: See pages 9, 12, and 13 of the instructions):				
2 Expenses definitely related to the income on line 1 (attach statement). . . . .	NONE			
3 Pro rata share of other deductions not definitely related:				
a Certain itemized deductions or standard deduction. See instructions . . . . .	121,983.			
b Other deductions (attach statement) . . . . .	121,983.			
c Add lines 3a and 3b. . . . .	7,436.			
d Gross foreign source income (see instructions) . . . . .	1,895,877.			
e Gross income from all sources (see instructions) . . . . .	0.00392220			
f Divide line 3d by line 3e (see instructions) . . . . .	478.			
g Multiply line 3c by line 3f . . . . .				
4 Pro rata share of interest expense (see instructions):				
a Home mortgage interest (use worksheet on page 12 of the instructions) . . . . .				
b Other interest expense . . . . .				
5 Losses from foreign sources . . . . .				
6 Add lines 2, 3g, 4a, 4b, and 5 . . . . .	478.			478.
7 Subtract line 6 from line 1. Enter the result here and on line 14, page 2 . . . . . ▶				6,958.

## Part II Foreign Taxes Paid or Accrued (See page 13 of the instructions)

Foreign taxes paid or accrued (SEE page 16 of the instructions)										
CREDIT IS CLAIMED FOR TAXES (you must check one)	Foreign taxes paid or accrued									
	In foreign currency					In U.S. dollars				
	Taxes withheld at source on:				(s) Other foreign taxes paid or accrued	Taxes withheld at source on:			(w) Other foreign taxes paid or accrued	(x) Total foreign taxes paid or accrued (add cols. (t) through (w))
	(m) <input type="checkbox"/> Paid (n) <input checked="" type="checkbox"/> Accrued	(o) Date paid or accrued	(p) Dividends	(q) Rents and royalties		(r) Interest	(t) Dividends	(u) Rents and royalties		
	08/22/2002					2,052.				2,052.

Add lines A through C, column (x). Enter the total here and on line 9, page 2 . . . . . ▶

Paperwork Reduction Act Notice, see page 16 of the instructions.

1410 1.000 JSA

Form 1116 (2002)

**Part III Figuring the Credit**

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I . . . . .	9	2,052.	
10	Carryback or carryover (attach detailed computation) . . . . .	10		
11	Add lines 9 and 10 . . . . .	11	2,052.	
12	Reduction in foreign taxes. (see page 13 of the instructions). . . . .	12		
13	Subtract line 12 from line 11. This is the total amount of foreign taxes available for credit . . . . .	13	2,052.	
14	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I. (see page 14 of the instructions). . . . .	14	6,958.	
15	Adjustments to line 14. (see page 14 of the instructions). . . . .	15		
16	Combine the amounts on lines 14 and 15. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 17 through 21. However, if you are filing more than one Form 1116, you must complete line 19.) . . . . .	16	6,958.	
17	<b>Individuals:</b> Enter the amount from Form 1040, line 39. If you are a nonresident alien, enter the amount from Form 1040NR, line 37. <b>Estates and trusts:</b> Enter your taxable income without the deduction for your exemption. . . . . <b>SEE STATEMENT 13</b> . . . . .	17	1,125,891.	
18	<b>Caution:</b> If you figured your tax using the special rates on capital gains, see page 15 of the instructions. Divide line 16 by line 17. If line 16 is more than line 17, enter "1". . . . .	18	0.00617999	
19	<b>Individuals:</b> Enter the amount from Form 1040, line 42. If you are a nonresident alien, enter the amount from Form 1040NR, line 40. <b>Estates and trusts:</b> Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37. . . . .	19	311,903.	
20	<b>Caution:</b> If you are completing line 19 for separate category g (lump-sum distributions), see page 15 of the instructions. Multiply line 19 by line 18 (maximum amount of credit) . . . . .	20	1,928.	
21	Enter the smaller of line 13 or line 20. If this is the only Form 1116 you are filing, skip lines 22 through 30 and enter this amount on line 31. Otherwise, complete the appropriate line in Part IV (see page 16 of the instructions). . . . .	21	1,928.	

**Part IV Summary of Credits From Separate Parts III (see page 16 of the instructions)**

22	Credit for taxes on passive income . . . . .	22		
23	Credit for taxes on high withholding tax interest . . . . .	23		
24	Credit for taxes on financial services income . . . . .	24		
25	Credit for taxes on shipping income . . . . .	25		
26	Credit for taxes on dividends from a DISC or former DISC and certain distributions from a FSC or former FSC . . . . .	26		
27	Credit for taxes on lump-sum distributions . . . . .	27		
28	Credit for taxes on certain income re-sourced by treaty . . . . .	28		
29	Credit for taxes on general limitation income . . . . .	29		
30	Add lines 22 through 29 . . . . .	30		
31	Enter the smaller of line 19 or line 30 . . . . .	31	1,928.	
32	Reduction of credit for international boycott operations. See instructions for line 12 on page 13 . . . . .	32		
33	Subtract line 32 from line 31. This is your foreign tax credit. Enter here and on Form 1040, line 45; Form 1040NR, line 43; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a . . . . .	33	1,928.	

**6251****Alternative Minimum Tax - Individuals**

OMB No. 1545-0023

**2002**Attachment  
Sequence No. 32

▶ See separate instructions.

▶ Attach to Form 1040 or Form 1040NR.

Form

Department of the Treasury  
Internal Revenue Service (99)

Name(s) shown on Form 1040

Your social security number

**RICHARD B CHENEY & LYNNE V CHENEY****Part I Alternative Minimum Taxable Income** (See instructions for how to complete each line.)

1	If filing Schedule A (Form 1040), enter the amount from Form 1040, line 39, and go to line 2. Otherwise, enter the amount from Form 1040, line 36, and go to line 7. (If zero or less, enter as a negative amount.)	1	945,051.
2	Medical and dental. Enter the smaller of Schedule A (Form 1040), line 4 or 2 1/2% of Form 1040, line 36	2	
3	Taxes from Schedule A (Form 1040), line 9	3	6,381.
4	Certain interest on a home mortgage not used to buy, build, or improve your home	4	
5	Miscellaneous deductions from Schedule A (Form 1040), line 26	5	124,203.
6	If Form 1040, line 36, is over \$137,300 (over \$68,650 if married filing separately), enter the amount from line 9 of the worksheet for Schedule A (Form 1040), line 28	6	( 30,883.)
7	Tax refund from Form 1040, line 10 or line 21	7	( )
8	Investment interest expense (difference between regular tax and AMT)	8	
9	Depletion (difference between regular tax and AMT)	9	
10	Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	10	
11	Interest from specified private activity bonds exempt from the regular tax	11	82,488.
12	Qualified small business stock (42% of gain excluded under section 1202)	12	
13	Exercise of incentive stock options (excess of AMT income over regular tax income)	13	
14	Estates and trusts (amount from Schedule K-1 (Form 1041), line 9)	14	
15	Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 6)	15	
16	Disposition of property (difference between AMT and regular tax gain or loss)	16	
17	Depreciation on assets placed in service after 1986 (difference between regular tax and AMT)	17	
18	Passive activities (difference between AMT and regular tax income or loss)	18	
19	Loss limitations (difference between AMT and regular tax income or loss)	19	
20	Circulation costs (difference between regular tax and AMT)	20	
21	Long-term contracts (difference between AMT and regular tax income)	21	
22	Mining costs (difference between regular tax and AMT)	22	
23	Research and experimental costs (difference between regular tax and AMT)	23	
24	Income from certain installment sales before January 1, 1987	24	( )
25	Intangible drilling costs preference	25	
26	Other adjustments, including income-based related adjustments	26	NONE
27	Alternative tax net operating loss deduction	27	( )
28	Alternative minimum taxable income. Combine lines 1 through 27. (If married filing separately and line 28 is more than \$173,000, see page 7 of the instructions)	28	1,127,240.

**Part II Alternative Minimum Tax**

29	Exemption. (If this form is for a child under age 14, see page 7 of the instructions.)		
<p>IF your filing status is . . .</p> <p>Single or head of household . . . \$112,500</p> <p>Married filing jointly or qualifying widow(er) . . . 150,000</p> <p>Married filing separately . . . 75,000</p> <p>AND line 28 is not over . . .</p> <p>THEN enter on line 29 . . .</p> <p>\$35,750</p> <p>49,000</p> <p>24,500</p>		29	STMT 16 NONE
If line 28 is over the amount shown above for your filing status, see page 7 of the instructions.			
30	Subtract line 29 from line 28. If zero or less, enter -0- here and on lines 33 and 35 and stop here	30	1,127,240.
31	<p>• If you reported capital gain distributions directly on Form 1040, line 13, or you had a gain on both lines 16 and 17 of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on the back and enter the amount from line 57 here.</p> <p>• All others: If line 30 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 30 by 26% (.26). Otherwise, multiply line 30 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result.</p>	31	311,903.
32	Alternative minimum tax foreign tax credit (see page 7 of the instructions)	32	1,928.
33	Tentative minimum tax. Subtract line 32 from line 31	33	309,975.
34	Tax from Form 1040, line 42 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 45)	34	332,976.
35	Alternative minimum tax. Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 43	35	NONE

or Paperwork Reduction Act Notice, see page 8 of the instructions.

Form 6251 (2002)

**Part III Tax Computation Using Maximum Capital Gains Rates**

**Caution:** If you did not complete Part IV of Schedule D (Form 1040), see page 8 of the instructions before you complete this part.

36	Enter the amount from Form 6251, line 30	36	1,127,240.
37	Enter the amount from Schedule D (Form 1040), line 23, or line 9 of the Schedule D Tax Worksheet on page D-9 of the instructions for Schedule D (Form 1040), whichever applies (as figured for the AMT, if necessary) (see page 8 of the instructions)	37	2,799.
38	Enter the amount from Schedule D (Form 1040), line 19 (as figured for the AMT, if necessary) (see page 8 of the instructions)	38	
39	If you did not complete a Schedule D Tax Worksheet for the regular tax or the AMT, enter the amount from line 37. Otherwise, add lines 37 and 38, and enter the smaller of that result or the amount from line 4 of the Schedule D Tax Worksheet (as figured for the AMT, if necessary)	39	2,799.
40	Enter the smaller of line 36 or line 39	40	2,799.
41	Subtract line 40 from line 36	41	1,124,441.
42	If line 41 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 41 by 26% (.26). Otherwise, multiply line 41 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result. <b>SEE STATEMENT 17.</b>	42	311,343.
43	Enter the amount from Schedule D (Form 1040), line 28, or line 16 of the Schedule D Tax Worksheet on page D-9 of the instructions for Schedule D (Form 1040), whichever applies (as figured for the regular tax) (see page 8 of the instructions)	43	
44	Enter the smaller of line 36 or line 37	44	2,799.
45	Enter the smaller of line 43 or line 44. If zero, go to line 51	45	
46	Enter your qualified 5-year gain, if any, from Schedule D (Form 1040), line 29 (as figured for the AMT, if necessary) (see page 8 of the instructions)	46	
47	Enter the smaller of line 45 or line 46	47	
48	Multiply line 47 by 8% (.08)	48	
49	Subtract line 47 from line 45	49	
50	Multiply line 49 by 10% (.10)	50	
51	Subtract line 45 from line 44	51	2,799.
52	Multiply line 51 by 20% (.20) If line 38 is zero or blank, skip lines 53 and 54 and go to line 55. Otherwise, go to line 53.	52	560.
53	Subtract line 44 from line 40	53	
54	Multiply line 53 by 25% (.25)	54	
55	Add lines 42, 48, 50, 52, and 54	55	311,903.
56	If line 36 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 36 by 26% (.26). Otherwise, multiply line 36 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result. <b>SEE STATEMENT 17.</b>	56	312,127.
57	Enter the smaller of line 55 or line 56 here and on line 31	57	311,903.



## (Form 1040)

Department of the Treasury  
Internal Revenue Service (99)

**Household Employment Taxes**  
(For Social Security, Medicare, Withheld Income, and Federal Unemployment (FUTA) Taxes)  
▶ Attach to Form 1040, 1040NR, 1040-SS, or 1041.  
▶ See separate instructions.

**2002**  
Attachment  
Sequence No. 44

Name of employer

Social security number

Employer identification number

**LYNNE V CHENEY**

**A** Did you pay any one household employee cash wages of \$1,300 or more in 2002? (If any household employee was your spouse, your child under age 21, your parent, or anyone under age 18, see the line A instructions on page 3 before you answer this question.)

- ☒ **Yes.** Skip lines B and C and go to line 1.  
☐ **No.** Go to line B.

**B** Did you withhold Federal income tax during 2002 for any household employee?

- ☐ **Yes.** Skip line C and go to line 5.  
☐ **No.** Go to line C.

**C** Did you pay total cash wages of \$1,000 or more in any calendar quarter of 2001 or 2002 to household employees? (Do not count cash wages paid in 2001 or 2002 to your spouse, your child under age 21, or your parent.)

- ☐ **No.** Stop. Do not file this schedule.  
☐ **Yes.** Skip lines 1-9 and go to line 10 on the back.

**Part I Social Security, Medicare, and Income Taxes**

1	Total cash wages subject to social security taxes (see page 3)	1	5,400.
2	Social security taxes. Multiply line 1 by 12.4% (.124)	2	670.
3	Total cash wages subject to Medicare taxes (see page 3)	3	5,400.
4	Medicare taxes. Multiply line 3 by 2.9% (.029)	4	157.
5	Federal income tax withheld, if any	5	
6	Total social security, Medicare, and income taxes (add lines 2, 4, and 5)	6	827.
7	Advance earned income credit (EIC) payments, if any	7	
8	Net taxes (subtract line 7 from line 6)	8	827.

**9** Did you pay total cash wages of \$1,000 or more in any calendar quarter of 2001 or 2002 to household employees? (Do not count cash wages paid in 2001 or 2002 to your spouse, your child under age 21, or your parent.)

- ☐ **No.** Stop. Enter the amount from line 8 above on Form 1040, line 60. If you are not required to file Form 1040, see the line 9 instructions on page 4.  
☒ **Yes.** Go to line 10 on the back.

For Paperwork Reduction Act Notice, see Form 1040 Instructions.

Schedule H (Form 1040) 2002

Schedule H (Form 1040) 2002 **LYN V CHENEY****Part II Federal Unemployment (FUTA) Tax**

	Yes
Did you pay unemployment contributions to only one state?	<b>10</b> <b>X</b>
Did you pay all state unemployment contributions for 2002 by April 15, 2003? Fiscal year filers, see page 4	<b>11</b> <b>X</b>
Were all wages that are taxable for FUTA tax also taxable for your state's unemployment tax?	<b>12</b> <b>X</b>

Next: If you checked the "Yes" box on all the lines above, complete Section A.  
If you checked the "No" box on any of the lines above, skip Section A and complete Section B.

**Section A**

Name of the state where you paid unemployment contributions ▶ <b>DC</b>	
State reporting number as shown on state unemployment tax return ▶ <b>128 768</b>	
Contributions paid to your state unemployment fund (see page 4) . . . . . <b>15</b> <b>146.</b>	
Total cash wages subject to FUTA tax (see page 4) . . . . .	<b>16</b> <b>5,400.</b>
FUTA tax. Multiply line 16 by .008. Enter the result here, skip Section B, and go to line 26 . . . . .	<b>17</b> <b>43.</b>

**Section B**

Complete all columns below that apply (if you need more space, see page 4):

(a) Name of state	(b) State reporting number as shown on state unemployment tax return	(c) Taxable wages (as defined in state act)	(d) State experience rate period		(e) State experience rate	(f) Multiply col. (c) by .054	(g) Multiply col. (c) by col. (e)	(h) Subtract col. (g) from col. (f). If zero or less, enter -0-	(i) Contributions paid to state unemployment fund
			From	To					
Totals . . . . .								<b>19</b>	
Add columns (h) and (i) of line 19 . . . . .								<b>20</b>	
Total cash wages subject to FUTA tax (see the line 16 instructions on page 4) . . . . .								<b>21</b>	
Multiply line 21 by 6.2% (.062) . . . . .								<b>22</b>	
Multiply line 21 by 5.4% (.054) . . . . .								<b>23</b>	
Enter the smaller of line 20 or line 23 . . . . .								<b>24</b>	
FUTA tax. Subtract line 24 from line 22. Enter the result here and go to line 26 . . . . .								<b>25</b>	

**Part III Total Household Employment Taxes**

Enter the amount from line 8 . . . . .	<b>26</b> <b>827.</b>
Add line 17 (or line 25) and line 26 . . . . .	<b>27</b> <b>870.</b>
Are you required to file Form 1040?	
<input checked="" type="checkbox"/> <b>Yes.</b> Stop. Enter the amount from line 27 above on Form 1040, line 60. Do not complete Part IV below.	
<input type="checkbox"/> <b>No.</b> You may have to complete Part IV. See page 4 for details.	

**Part IV Address and Signature - Complete this part only if required. See the line 28 instructions on page 4.**

Address (number and street) or P.O. box if mail is not delivered to street address	Apt., room, or suite no.
City, town, or post office, state, and ZIP code	

Under penalties of perjury, I declare that I have examined this schedule, including accompanying statements, and to the best of my knowledge and belief, it is true, correct, and complete. No part of any payment made to a state unemployment fund claimed as a credit was, or is to be, deducted from the payments to employees.

Employer's signature

Date

Schedule H (Form 1040) 2002

Form **8283****Noncash Charitable Contributions**

OMB No. 1545-0008

(Rev. October 1998)

▶ Attach to your tax return if you claimed a total deduction of over \$500 for all contributed property.

▶ See separate instructions.

Department of the Treasury  
Internal Revenue ServiceAttachment  
Sequence No. **55**

Name(s) shown on your income tax return

Identifying number

**RICHARD B CHENEY & LYNNE V CHENEY****Note:** Figure the amount of your contribution deduction before completing this form. See your tax return instructions.**Section A** - List in this section only items (or groups of similar items) for which you claimed a deduction of \$5,000 or less. Also, list certain publicly traded securities even if the deduction is over \$5,000 (see instructions).**Part I** Information on Donated Property - If you need more space, attach a statement.

1	(a) Name and address of the donee organization	(b) Description of donated property
A	<b>CAPITAL PARTNERS FOR EDUCATION 1524 35TH NW, WASH, DC 20007</b>	<b>12 SHS OF ANADARRO PETROLEUM CORP. STOCK</b>
B		
C		
D		
E		

**Note:** If the amount you claimed as a deduction for the item is \$500 or less, you do not have to complete columns (d), (e), and (f).

	(c) Date of the contribution	(d) Date acquired by donor (mo., yr.)	(e) How acquired by donor	(f) Donor's cost or adjusted basis	(g) Fair market value	(h) Method used to determine the fair market value
A	<b>02/14/2002</b>	<b>01/31/2002</b>	<b>DEF. COMP</b>	<b>563.</b>	<b>589.</b>	<b>AVERAGE HIGH/LOW</b>
B						
C						
D						
E						

**Part II** Other Information - Complete line 2 if you gave less than an entire interest in property listed in Part I.  
Complete line 3 if conditions were attached to a contribution listed in Part I.

- 2 If, during the year, you contributed less than the entire interest in the property, complete lines a - e
- a Enter the letter from Part I that identifies the property ▶ . If Part II applies to more than one property, attach a separate statement.
- b Total amount claimed as a deduction for the property listed in Part I: (1) For this tax year ▶  
(2) For any prior tax years ▶
- c Name and address of each organization to which any such contribution was made in a prior year (complete only if different from the donee organization above).
- Name of charitable organization (donee)
- Address (number, street, and room or suite no.)
- City or town, state, and ZIP code
- d For tangible property, enter the place where the property is located or kept ▶
- e Name of any person, other than the donee organization, having actual possession of the property ▶

- 3 If conditions were attached to any contribution listed in Part I, answer the questions a - c and attach the required statement (see instructions):

- a Is there a restriction, either temporary or permanent, on the donee's right to use or dispose of the donated property?
- b Did you give to anyone (other than the donee organization or another organization participating with the donee organization in cooperative fundraising) the right to the income from the donated property or to the possession of the property, including the right to vote donated securities, to acquire the property by purchase or otherwise, or to designate the person having such income, possession, or right to acquire?
- c Is there a restriction limiting the donated property for a particular use?

Yes	No

For Paperwork Reduction Act Notice, see page 4 of separate instructions.

Form **8283** (Rev. 10-98)

Form

**4562**

# **Depreciation and Amortization** (Including Information on Listed Property)

**2002**  
Attachment  
Sequence No. **67**  
Identifying number

Department of the Treasury  
Internal Revenue Service

▶ See separate instructions.

▶ Attach to your tax return.

Name(s) shown on return

**RICHARD B CHENEY & LYNNE V CHENEY**

Business or activity to which this form relates

**SIMON & SCHUSTER, INC.**

- SCHEDULE E

**Part I Election To Expense Certain Tangible Property Under Section 179**

Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount. See page 2 of the instructions for a higher limit for certain businesses	1	24,000.
2	Total cost of section 179 property placed in service (see page 2 of the instructions)	2	3,518.
3	Threshold cost of section 179 property before reduction in limitation	3	200,000.
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0-	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see page 2 of the instructions	5	24,000.

(a) Description of property	(b) Cost (business use only)	(c) Elected cost
6		
7	Listed property. Enter the amount from line 29	7 3,518.
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7	8 3,518.
9	Tentative deduction. Enter the smaller of line 5 or line 8	9 3,518.
10	Carryover of disallowed deduction from line 13 of your 2001 Form 4562	10
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instructions)	11 24,000.
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11	12 3,518.
13	Carryover of disallowed deduction to 2003. Add lines 9 and 10, less line 12	13

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.

**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see page 3 of the instructions)	14
15	Property subject to section 168(f)(1) election (see page 4 of the instructions)	15
16	Other depreciation (including ACRS) (see page 4 of the instructions)	16

**Part III MACRS Depreciation (Do not include listed property.) (See page 4 of the instructions.)****Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2002	17
18	If you are electing under section 168(f)(4) to group any assets placed in service during the tax year into one or more general asset accounts, check here <input type="checkbox"/>	

**Section B - Assets Placed in Service During 2002 Tax Year Using the General Depreciation System**

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only - see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property			27.5 yrs.	MM	S/L	
i Nonresidential real property			27.5 yrs.	MM	S/L	
			39 yrs.	MM	S/L	
				MM	S/L	

**Section C - Assets Placed in Service During 2002 Tax Year Using the Alternative Depreciation System**

20a Class life					S/L	
b 12-year			12 yrs.		S/L	
c 40-year			40 yrs.	MM	S/L	

**Part IV Summary (see page 6 of the instructions)**

21	Listed property. Enter amount from line 28	21
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations - see Instr.	22 3,518.
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs	23

For Paperwork Reduction Act Notice, see separate instructions.

Form 4562 (2002)

Form 4562 (2002)

**Part V Listed Property** (include automobiles, certain other vehicles, cellular telephones, certain computers, property used for entertainment, recreation, or amusement.)

**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (a) through (c) of Section A, all of Section B, and Section C if applicable.

**Section A - Depreciation and Other Information** (Caution: See page 8 of the instructions for limits for passenger automobiles.)

24a Do you have evidence to support the business/investment use claimed?				Yes	No	24b If "Yes," is the evidence written?				Yes	No
(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/Convention	(h) Depreciation deduction	(i) Elected section 179 cost			
25 Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see page 7 of the instructions)									25		
26 Property used more than 50% in a qualified business use (see page 7 of the instructions):											
COMPUTER	04/15/2002	100.00%	3,518.		3	200DB-HY		3,518.			
		%									
		%									
27 Property used 50% or less in a qualified business use (see page 7 of the instructions):											
		%				S/L -					
		%				S/L -					
		%				S/L -					
28 Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1									28		
29 Add amounts in column (i), line 26. Enter here and on line 7, page 1									29	3,518.	

**Section B - Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person.

If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle 1		(b) Vehicle 2		(c) Vehicle 3		(d) Vehicle 4		(e) Vehicle 5		(f) Vehicle 6	
30 Total business/investment miles driven during the year (do not include commuting miles - see page 2 of the instructions)												
31 Total commuting miles driven during the year												
32 Total other personal (noncommuting) miles driven												
33 Total miles driven during the year. Add lines 30 through 32												
34 Was the vehicle available for personal use during off-duty hours?	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No	Yes	No
35 Was the vehicle used primarily by a more than 5% owner or related person?												
36 Is another vehicle available for personal use?												

**Section C - Questions for Employers Who Provide Vehicles for Use by Their Employees**

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons (see page 8 of the instructions).

	Yes	No
37 Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees?		
38 Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See page 8 of the instructions for vehicles used by corporate officers, directors, or 1% or more owners		
39 Do you treat all use of vehicles by employees as personal use?		
40 Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received?		
41 Do you meet the requirements concerning qualified automobile demonstration use? (See page 9 of the instructions.)		

**Note:** If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.

**Part VI Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
42 Amortization of costs that begins during your 2002 tax year (see page 9 of the instructions):					
43 Amortization of costs that began before your 2002 tax year					43
44 Total. Add amounts in column (f). See page 9 of the instructions for where to report					44

**STATEMENT ATTACHED TO AND MADE PART OF  
2002 FORM 1040  
U.S. INDIVIDUAL INCOME TAX RETURN**

**RICHARD B. CHENEY & LYNNE V. CHENEY**  
**[REDACTED]**

Pursuant to Treas. Regs. § 1.1012-1(e)(6), the taxpayers hereby elect to adopt the single-category average cost method, as provided for in Treas. Regs. § 1.1012-1(e)(4), to calculate the adjusted basis of shares of the Vanguard Short-Term Tax-Exempt Admiral Fund the taxpayers sold in 2002 and sell in all years thereafter.



# Form 1040 U.S. Individual Income Tax Return 2003

Department of the Treasury - Internal Revenue Service

(99)

IRS Use Only - Do not write or staple in this space.

## Label

(See instructions on page 19.)  
Use the IRS label. Otherwise, please print or type.

For the year Jan. 1-Dec. 31, 2003, or other tax year beginning 2003, ending		OMB No. 1545-0074
Your first name and initial <b>RICHARD B</b>	Last name <b>CHENEY</b>	Your social security number [REDACTED]
If a joint return, spouse's first name and initial <b>LYNNE V</b>	Last name <b>CHENEY</b>	Spouse's social security number [REDACTED]
Home address (number and street). If you have a P.O. box, see page 19. [REDACTED]		Apt. no. [REDACTED]
City, town or post office, state, and ZIP code. If you have a foreign address, see page 19. [REDACTED]		

**Important!**  
You must enter your SSN(s) above.

You Spouse

Presidential Election Campaign (See page 19.)

Note. Checking "Yes" will not change your tax or reduce your refund.

Do you, or your spouse if filing a joint return, want \$3 to go to this fund?

☒ Yes ☐ No ☒ Yes ☐ No

## Filing Status

Check only one box

- 1 ☐ Single
- 2 ☒ Married filing jointly (even if only one had income)
- 3 ☐ Married filing separately. Enter spouse's SSN above and full name here.
- 4 ☐ Head of household (with qualifying person). (See page 20.) If the qualifying person is a child but not your dependent, enter this child's name here.
- 5 ☐ Qualifying widow(er) with dependent child (See page 20.)

## Exemptions

6a ☒ Yourself. If your parent (or someone else) can claim you as a dependent on his or her tax return, do not check box 6a.

b ☒ Spouse

c Dependents:

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) <input checked="" type="checkbox"/> <small>if you are claiming more than one dependent, check the number of dependents on this line</small>

If more than five dependents, see page 21.

No. of boxes checked on 6a and 6b: **2**  
No. of children on 6c who:  
a lived with you  
b did not live with you due to divorce or separation (see page 21)

Dependents on 6c not entered above: **2**  
Add numbers on lines above

d Total number of exemptions claimed

## Income

7	Wages, salaries, tips, etc. Attach Form(s) W-2	7	454,301.
8a	Taxable interest. Attach Schedule B if required	8a	6,564.
b	Tax-exempt interest. Do not include on line 8a. <b>STMT 1</b>	8b	627,005.
9a	Ordinary dividends. Attach Schedule B if required	9a	137,644.
b	Qualified dividends (see page 23). <b>STMT 1</b>	9b	84,132.
10	Taxable refunds, credits, or offsets of state and local income taxes (see page 23)	10	
11	Alimony received	11	
12	Business income or (loss). Attach Schedule C or C-EZ	12	44,580.
13a	Capital gain or (loss). Attach Schedule D if required. If not required, check here <input type="checkbox"/>	13a	302,602.
b	If box on 13a is checked, enter post-May 5 capital gain distributions	13b	
14	Other gains or (losses). Attach Form 4797	14	
15a	IRA distributions	15a	
b	Taxable amount (see page 25)	15b	
16a	Pensions and annuities	16a	
b	Taxable amount (see page 25)	16b	NONE
17	Rental real estate, royalties, partnerships, S corporations, trusts, etc. Attach Schedule E	17	327,643.
18	Farm income or (loss). Attach Schedule F	18	
19	Unemployment compensation	19	
20a	Social security benefits	20a	
b	Taxable amount (see page 27)	20b	
21	Other income. List type and amount (see page 27)	21	
22	Add the amounts in the far right column for lines 7 through 21. This is your total income	22	1,273,334.

## Adjusted Gross Income

23	Educator expenses (see page 29)	23	
24	IRA deduction (see page 29)	24	
25	Student loan interest deduction (see page 31)	25	
26	Tuition and fees deduction (see page 32)	26	
27	Moving expenses. Attach Form 3903	27	
28	One-half of self-employment tax. Attach Schedule SE	28	5,419.
29	Self-employed health insurance deduction (see page 33)	29	
30	Self-employed SEP, SIMPLE, and qualified plans	30	
31	Penalty on early withdrawal of savings	31	
32a	Alimony paid b Recipient's SSN	32a	
33	Add lines 23 through 32a	33	5,419.
34	Subtract line 33 from line 22. This is your adjusted gross income	34	1,267,915.

ISA For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see page 77.

3A1210 2.000

Form 1040 (2003)

**Tax and Credits****Standard Deduction for -**

• People who checked any box on line 36a or 36b or who can be claimed as a dependent, see page 34.

• All others:

Single or Married filing separately. \$4,750

Married filing jointly or Qualifying widow(er). \$9,500

Head of household. \$7,000

35	Amount from line 34 (adjusted gross income)	35	1,267,915.
36a	Check <input type="checkbox"/> You were born before January 2, 1939, <input type="checkbox"/> Blind. <input type="checkbox"/> Total boxes checked <input type="checkbox"/> 36a		
	If: <input type="checkbox"/> Spouse was born before January 2, 1939, <input type="checkbox"/> Blind.		
	b If you are married filing separately and your spouse itemizes deductions, or you were a dual-status alien, see page 34 and check here <input type="checkbox"/> 36b		
37	Itemized deductions (from Schedule A) or your standard deduction (see left margin)	37	454,649.
38	Subtract line 37 from line 35	38	813,266.
39	If line 35 is \$104,625 or less, multiply \$3,050 by the total number of exemptions claimed on line 6d. If line 35 is over \$104,625, see the worksheet on page 35	39	SEE STMT 2
40	Taxable income. Subtract line 39 from line 38. If line 39 is more than line 38, enter -0-	40	813,266.
41	Tax (see page 36). Check if any tax is from: <input type="checkbox"/> Form(s) 9814 <input type="checkbox"/> Form 4972	41	201,171.
42	Alternative minimum tax (see page 38). Attach Form 6251	42	47,198.
43	Add lines 41 and 42	43	248,369.
44	Foreign tax credit. Attach Form 1116 if required	44	6,977.
45	Credit for child and dependent care expenses. Attach Form 2441	45	
46	Credit for the elderly or the disabled. Attach Schedule R	46	
47	Education credits. Attach Form 8863	47	
48	Retirement savings contributions credit. Attach Form 8880	48	
49	Child tax credit (see page 40)	49	
50	Adoption credit. Attach Form 8839	50	
51	Credits from: <input type="checkbox"/> Form 8396 <input type="checkbox"/> Form 8859	51	
52	Other credits. Check applicable box(es): <input type="checkbox"/> Form 3800	52	
	<input type="checkbox"/> Form 8801 <input type="checkbox"/> Specify		
53	Add lines 44 through 52. These are your total credits	53	6,977.
54	Subtract line 53 from line 43. If line 53 is more than line 43, enter -0-	54	241,392.
55	Self-employment tax. Attach Schedule SE	55	10,837.
56	Social security and Medicare tax on tip income not reported to employer. Attach Form 4137	56	
57	Tax on qualified plans, including IRAs, and other tax-favored accounts. Attach Form 5329 if required	57	
58	Advance earned income credit payments from Form(s) W-2	58	
59	Household employment taxes. Attach Schedule H	59	838.
60	Add lines 54 through 59. This is your total tax	60	253,067.

**Other Taxes****Payments**

If you have a qualifying child, attach Schedule EIC.

61	Federal income tax withheld from Forms W-2 and 1099	61	103,779.
62	2003 estimated tax payments and amount applied from 2002 return	62	155,000.
63	Earned income credit (EIC)	63	
64	Excess social security and tier 1 RRTA tax withheld (see page 56)	64	
65	Additional child tax credit. Attach Form 8812	65	
66	Amount paid with request for extension to file (see page 56)	66	
67	Other payments from: <input type="checkbox"/> Form 2439 <input type="checkbox"/> Form 4136 <input type="checkbox"/> Form 8865	67	
68	Add lines 61 through 67. These are your total payments	68	258,779.

**Refund**

Direct deposit? See page 56 and fill in 70b, 70c, and 70d.

69	If line 68 is more than line 60, subtract line 60 from line 68. This is the amount you overpaid	69	5,712.
70a	Amount of line 69 you want refunded to you	70a	
	b Routing number <input type="text"/> c Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings		
	d Account number <input type="text"/>		
71	Amount of line 69 you want applied to your 2004 estimated tax	71	5,712.

**Amount You Owe**

72	Amount you owe. Subtract line 68 from line 60. For details on how to pay, see page 57	72	NONE
73	Estimated tax penalty (see page 58)	73	

**Third Party Designee**

Do you want to allow another person to discuss this return with the IRS (see page 58)? ☒ Yes. Complete the following. ☐ No

Designee's name **PREPARER** Phone no.  Personal identification number (PIN)

**Sign Here**

Joint return? See page 20. Keep a copy for your records.

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature *Richard S. Chavira* Date **4-6-04** Your occupation **VICE PRESIDENT** Daytime phone number

Spouse's signature, if a joint return, both must sign. *[Signature]* Date **4/6/04** Spouse's occupation **EXECUTIVE**

**Paid****Preparer's Use Only**

Preparer's signature *[Signature]* Date **10 April 04** Check if self-employed ☐ Preparer's SSN or PTIN

Firm's name (or yours if self-employed), address, and ZIP code **KPMG LLP**  
**717 N. HARWOOD STREET, SUITE 3100**  
**DALLAS TX 75201**

**Underpayment of  
Estimated Tax by Individuals, Estates, and Trusts**  
▶ See separate instructions.  
▶ Attach to Form 1040, 1040A, 1040NR, 1040NR-EZ, or 1041.

Name(s) shown on tax return

**RICHARD B CHENEY & LYNNE V CHENEY**

**Do You Have To File Form 2210?**

Complete lines 1 through 7 below. Is line 7 less than \$1,000? **Yes** → Do not file Form 2210. You do not owe a penalty.

**No** → Complete lines 8 and 9 below. Is line 8 equal to or more than line 9? **Yes** → You do not owe a penalty. Do not file Form 2210 (but if box E applies, you must file page 1 of Form 2210).

**No** → You may owe a penalty. Does any box in Part II below apply? **Yes** → You must file Form 2210. Does box B, C, or D apply?  
**No** → You are not required to figure your penalty because the RS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return (see page 3 of the instructions), but file only page 1 of Form 2210.  
**Yes** → You must figure your penalty.

**No** → Do not file Form 2210. You are not required to figure your penalty because the IRS will figure it and send you a bill for any unpaid amount. If you want to figure it, you may use Part III or Part IV as a worksheet and enter your penalty amount on your tax return (see page 3 of the instructions), but do not file Form 2210.

**Part I Required Annual Payment** (see page 2 of the instructions)

1	Enter your 2003 tax after credits from Form 1040, line 54 (or comparable line of your return)	1	241,392.
2	Other taxes, including self-employment tax (see page 2 of the instructions)	2	11,675.
3	Refundable credits. Enter the total of your earned income credit, additional child tax credit, credit for Federal tax paid on fuels, and health insurance credit for eligible individuals	3	( )
4	Current year tax. Combine lines 1, 2, and 3	4	253,067.
5	Multiply line 4 by 90% (.90)	5	227,760.
6	Withholding taxes. Do not include estimated tax payments. See page 2 of the instructions	6	103,778.
7	Subtract line 6 from line 4. If less than \$1,000, you do not owe a penalty; do not file Form 2210	7	149,289.
8	Maximum required annual payment based on prior year's tax (see page 2 of the instructions)	8	375,225.
9	Required annual payment. Enter the smaller of line 5 or line 8	9	227,760.

Next: Is line 9 more than line 6?

- ☐ No. You do not owe a penalty. Do not file Form 2210 unless box E below applies.
- ☒ Yes. You may owe a penalty, but do not file Form 2210 unless one or more boxes in Part II below applies.
- If box B, C, or D applies, you must figure your penalty and file Form 2210.
  - If only box A or E (or both) applies, file only page 1 of Form 2210. You are not required to figure your penalty; the IRS will figure it and send you a bill for any unpaid amount. If you want to figure your penalty, you may use Part III or Part IV as a worksheet and enter your penalty on your tax return (see page 3 of the instructions), but file only page 1 of Form 2210.

**Part II Reasons for Filing.** Check applicable boxes. If none apply, do not file Form 2210.

- A** ☐ You request a waiver (see page 1 of the instructions) of your entire penalty. You must check this box and file page 1 of Form 2210, but you are not required to figure your penalty.
- B** ☐ You request a waiver (see page 1 of the instructions) of part of your penalty. You must figure your penalty and waiver amount and file Form 2210.
- C** ☐ Your income varied during the year and your penalty is reduced or eliminated when figured using the annualized income installment method. You must figure the penalty using Schedule AI and file Form 2210.
- D** ☒ Your penalty is lower when figured by treating the Federal income tax withheld from your wages as paid on the dates it was actually withheld, instead of in equal amounts on the payment due dates. You must figure your penalty and file Form 2210.
- E** ☐ You filed or are filing a joint return for either 2002 or 2003, but not for both years, and line 8 above is smaller than line 5 above. You must file page 1 of Form 2210, but you are not required to figure your penalty (unless box B, C, or D applies).

**Part IV Regular Method** (See page 3 of the instructions if you are filing Form 1040NR or 1040NR-EZ.)

Section A - Figure Your Underpayment		Payment Due Dates			
		(a) 4/15/03	(b) 6/15/03	(c) 9/15/03	(d) 1/15/04
18	Required installments. If box C in Part II applies, enter the amounts from Schedule AI, line 25. Otherwise, enter 25% (.25) of line 9, Form 2210, in each column.	56,940.	56,940.	56,940.	56,940.
19	Estimated tax paid and tax withheld (see page 2 of the instructions). For column (a) only, also enter the amount from line 19 on line 23. If line 19 is equal to or more than line 18 for all payment periods, stop here; you do not owe a penalty. Do not file Form 2210 unless you checked a box in Part II.	85,433.	39,860.	58,256.	75,229.
20	Enter amount, if any, from line 26 in previous column.		28,493.	11,413.	12,729.
21	Add lines 19 and 20.		68,353.	69,669.	87,958.
22	Add the amounts on lines 24 and 25 in previous column.				
23	Subtract line 22 from line 21. If zero or less, enter -0-. For column (a) only, enter the amount from line 19.	85,433.	68,353.	69,669.	87,958.
24	If line 23 is zero, subtract line 21 from line 22. Otherwise, enter -0-.				
25	Underpayment. If line 18 is equal to or more than line 23, subtract line 23 from line 18. Then go to line 20 of the next column. Otherwise, go to line 26.				
26	Overpayment. If line 23 is more than line 18, subtract line 18 from line 23. Then go to line 20 of the next column.	28,493.	11,413.	12,729.	

**Section B - Figure the Penalty** (Complete lines 27 through 32 of one column before going to the next column.)

April 16, 2003 - September 30, 2003		4/15/03	6/15/03	9/15/03
27	Number of days from the date shown above line 27 to the date the amount on line 25 was paid or 9/30/03, whichever is earlier.	Days:	Days:	Days:
28	Underpayment on line 25. Number of days on line 27 x .05	\$	\$	\$
October 1, 2003 - December 31, 2003		9/30/03	9/30/03	9/30/03
29	Number of days from the date shown above line 29 to the date the amount on line 25 was paid or 12/31/03, whichever is earlier.	Days:	Days:	Days:
30	Underpayment on line 25. Number of days on line 29 x .04	\$	\$	\$
January 1, 2004 - April 15, 2004		12/31/03	12/31/03	12/31/03
31	Number of days from the date shown above line 31 to the date the amount on line 25 was paid or 4/15/04, whichever is earlier.	Days:	Days:	Days:
32	Underpayment on line 25. Number of days on line 31 x .04	\$	\$	\$
Penalty. Add all amounts on lines 28, 30, and 32 in all columns. Enter the total here and on Form 1040, line 73; Form 1040A, line 48; Form 1040NR, line 72; Form 1040NR-EZ, line 26; or Form 1041, line 26, but do not file Form 2210 unless you checked a box in Part II.				33 \$ <b>NONE</b>

Form 2210 (1003)

\*INCLUDES 2002 OVERPAYMENT OF \$ 20,000. APPLIED AT 4-15-2003.

# Schedule A - Itemized Deductions

(Schedule B is on back)

OMB No. 1545-0074

**2003**

Attachment  
Sequence No. **07**

Name(s) shown on Form 1040

▶ Attach to Form 1040. ▶ See instructions for Schedules A and B (Form 1040).

Your social security number

**RICHARD B CHENEY & LYNNE V CHENEY**

<b>Medical and Dental Expenses</b>		Caution. Do not include expenses reimbursed or paid by others.			
1	Medical and dental expenses (see page A-2)	1			
2	Enter amount from Form 1040, line 35	2			
3	Multiply line 2 by 7.5% (.075)	3			
4	Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-	4			
<b>Taxes You Paid</b>		5			
5	State and local income taxes	5			
6	Real estate taxes (see page A-2)	6		44,728.	
7	Personal property taxes	7			
8	Other taxes. List type and amount ▶	8			
9	Add lines 5 through 8	9			44,728.
<b>Interest You Paid</b>		10			
10	Home mortgage interest and points reported to you on Form 1098	10			
11	Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see page A-3 and show that person's name, identifying no., and address ▶	11			
12	Points not reported to you on Form 1098. See page A-3 for special rules	12			
13	Investment interest. Attach Form 4952 if required. (See page A-4)	13			
14	Add lines 10 through 13	14			
<b>Gifts to Charity</b>		15		320,634.	
15	Gifts by cash or check. If you made any gift of \$250 or more, see page A-4	15			
16	Other than by cash or check. If any gift of \$250 or more, see page A-4. You must attach Form 8283 if over \$500	16		507.	
17	Carryover from prior year	17			
18	Add lines 15 through 17	18			321,141.
<b>Casualty and Theft Losses</b>		19			
19	Casualty or theft loss(es). Attach Form 4684. (See page A-5)	19			
<b>Job Expenses and Other Miscellaneous Deductions</b>		20		24,951.	
20	Unreimbursed employee expenses - job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See page A-5.)	20			
SEE STATEMENT 6 & 7		21			
21	Tax preparation fees	21			
22	Other expenses- investment, safe deposit box, etc. List type and amount ▶	22		123,039.	
SEE STATEMENT 4		23		147,990.	
23	Add lines 20 through 22	23			
24	Enter amount from Form 1040, line 35	24		1,267,915.	
25	Multiply line 24 by 2% (.02)	25		25,358.	
26	Subtract line 25 from line 23. If line 25 is more than line 23, enter -0-	26			122,632.
<b>Other Miscellaneous Deductions</b>		27			
27	Other- from list on page A-8. List type and amount ▶	27			
<b>Limit on Itemized Deductions</b>		28		454,649.	
28	Is Form 1040, line 35, over \$139,500 (over \$69,750 if married filing separately)?	28			
<input type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 27. Also, enter this amount on Form 1040, line 37.					
<input checked="" type="checkbox"/> Yes. Your deduction may be limited. See page A-8 for the amount to enter.				SEE STMT 5	

Name(s) shown on Form 1040. Do not enter name and social security number if shown on other side.

Your social security number

**RICHARD B CHENEY & LYNNE V CHENEY****Schedule B - Interest and Ordinary Dividends**Attachment  
Sequence No. 08**Part I  
Interest**(See page B-1  
and the  
instructions for  
Form 1040,  
line 8a.)

- 1 List name of payer. If any interest is from a seller-financed mortgage and the buyer used the property as a personal residence, see page B-1 and list this interest first. Also, show that buyer's social security number and address ►

JACKSON STATE BANK AND TRUST  
NORTHERN TRUST BANK OF TEXAS  
US TREASURY

Amount

1,431.  
1,646.  
3,487.

Note. If you received a Form 1099-INT, Form 1099-OID, or substitute statement from a brokerage firm, list the firm's name as the payer and enter the total interest shown on that form.

- 2 Add the amounts on line 1 . . . . . 2 6,564.  
 3 Excludable interest on series EE and I U.S. savings bonds issued after 1989. Attach Form 8815 . . . . . 3  
 4 Subtract line 3 from line 2. Enter the result here and on Form 1040, line 8a . . . . . 4 6,564.

Note. If line 4 is over \$1,500, you must complete Part III.

**Part II  
Ordinary  
Dividends**(See page B-1  
and the  
instructions for  
Form 1040,  
line 9a.)

- 5 List name of payer ►

GMO REAL ESTATE FUND  
GMO TAX MANAGED SMALL COMPANIES III  
GMO TAX MANAGED US EQUITY III  
LAZARD FRERES & CO  
MORGAN STANLEY  
READER'S DIGEST  
VANGUARD INTER-TERM TREASURY ADM

Amount

13,931.  
7,356.  
46,292.  
47,103.  
237.  
1,530.  
21,195.

Note. If you received a Form 1099-DIV or substitute statement from a brokerage firm, list the firm's name as the payer and enter the ordinary dividends shown on that form.

- 6 Add the amounts on line 5. Enter the total here and on Form 1040, line 9a. . . . . 6
- 137,644.

Note. If line 6 is over \$1,500, you must complete Part III.

You must complete this part if you (a) had over \$1,500 of taxable interest or ordinary dividends; or (b) had a foreign account; or (c) received a distribution from, or were a grantor of, or a transferor to, a foreign trust.

- 7a At any time during 2003, did you have an interest in or a signature or other authority over a financial account in a foreign country, such as a bank account, securities account, or other financial account? See page B-2 for exceptions and filing requirements for Form TD F 90-22.1 . . . . . ☒

- b If "Yes," enter the name of the foreign country ►

- 8 During 2003, did you receive a distribution from, or were you the grantor of, or transferor to, a foreign trust? If "Yes," you may have to file Form 3520. See page B-2 . . . . . ☒

Yes No

☒☒



**SCHEDULE C  
(Form 1040)**

Department of the Treasury  
Internal Revenue Service (99)

**Profit or Loss From Business**

(Sole Proprietorship)

Partnerships, joint ventures, etc., must file Form 1065 or 1065-B.

Attach to Form 1040 or 1041.

See instructions for Schedule C (Form 1040).

OMB No. 1545-0074

**2003**

Attachment  
Sequence No. 09

Name of proprietor

**LYNNE V CHENEY**

Social security number (SSN)

A Principal business or profession, including product or service (see page C-2 of the instructions)

**CONSULTING**

B Enter code from pages C-7, 8, & 9

**541990**

C Business name. If no separate business name, leave blank.

**LYNNE V CHENEY**

D Employer ID number (EIN), if any

E Business address (including suite or room no.)

City, town or post office, state, and ZIP code

F Accounting method: (1) ☒ Cash (2) ☐ Accrual (3) ☐ Other (specify)

G Did you "materially participate" in the operation of this business during 2003? If "No," see page C-3 for limit on losses ☒ Yes ☐ No

H If you started or acquired this business during 2003, check here

**Part I Income**

1 Gross receipts or sales. Caution. If this income was reported to you on Form W-2 and the "Statutory employee" box on that form was checked, see page C-3 and check here <b>STMT. B.</b> <input type="checkbox"/>	1	<b>50,343.</b>
2 Returns and allowances	2	
3 Subtract line 2 from line 1	3	<b>50,343.</b>
4 Cost of goods sold (from line 42 on page 2)	4	
5 Gross profit. Subtract line 4 from line 3	5	<b>50,343.</b>
6 Other income, including Federal and state gasoline or fuel tax credit or refund (see page C-3)	6	
7 Gross income. Add lines 5 and 6	7	<b>50,343.</b>

**Part II Expenses. Enter expenses for business use of your home only on line 30.**

8 Advertising	8		19 Pension and profit-sharing plans	19	
9 Car and truck expenses (see page C-3)	9		20 Rent or lease (see page C-5):		
10 Commissions and fees	10		a Vehicles, machinery, and equipment	20a	
11 Contract labor (see page C-4)	11		b Other business property	20b	
12 Depletion	12		21 Repairs and maintenance	21	
13 Depreciation and section 179 expense deduction (not included in Part III) (see page C-4)	13		22 Supplies (not included in Part III)	22	
14 Employee benefit programs (other than on line 19)	14		23 Taxes and licenses	23	
15 Insurance (other than health)	15		24 Travel, meals, and entertainment:		
16 Interest:			a Travel	24a	
a Mortgage (paid to banks, etc.)	16a		b Meals and entertainment		
b Other	16b		c Enter nondeductible amount included on line 24b (see page C-6)		
17 Legal and professional services	17		d Subtract line 24c from line 24b	24d	
18 Office expense	18		25 Utilities	25	
8 Total expenses before expenses for business use of home. Add lines 8 through 27 in columns	28	<b>5,763.</b>	26 Wages (less employment credits)	26	
9 Tentative profit (loss). Subtract line 28 from line 7	29	<b>44,580.</b>	27 Other expenses (from line 48 on page 2)	27	<b>5,763.</b>
0 Expenses for business use of your home. Attach Form 8829	30				
1 Net profit or (loss). Subtract line 30 from line 29.					
<ul style="list-style-type: none"> <li>If a profit, enter on Form 1040, line 12, and also on Schedule SE, line 2 (statutory employees, see page C-6). Estates and trusts, enter on Form 1041, line 3.</li> <li>If a loss, you must go to line 32.</li> </ul>	31	<b>44,580.</b>			

If you have a loss, check the box that describes your investment in this activity (see page C-6).

If you checked 32a, enter the loss on Form 1040, line 12, and also on Schedule SE, line 2 (statutory employees, see page C-6). Estates and trusts, enter on Form 1041, line 3.

If you checked 32b, you must attach Form 6198.

32a ☒ All investment is a risk.  
32b ☐ Some investment is not at risk.

Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule C (Form 1040) 2003

"Yes," attach explanation ☐ Yes ☒ No

35

36

37

38

39

40

41

42

☐ Yes ☐ No☐ Yes ☐ No☐ Yes ☐ No

YES	NO
Yes	No

**4,11.3.**

1,650.

48

5.763.

**SCHEDULE D**  
**Form 1040**

Department of the Treasury  
Internal Revenue Service (99)

Name(s) shown on Form 1040

**Capital Gains and Losses**

▶ Attach to Form 1040.

▶ See instructions for Schedule D (Form 1040).

▶ Use Schedule D-1 to list additional transactions for lines 1 and 8.

OMB No. 1545-0074

**2003**

Attachment  
Sequence No. 12

Your social security number

**RICHARD B CHENEY & LYNNE V CHENEY**

**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold (Mo., day, yr.)	(d) Sales price (see page D-5 of the instructions)	(e) Cost or other basis (see page D-5 of the instructions)	(f) Gain or (loss) the entire year Subtract (e) from (d)	(g) Post-May 6 gain or (loss)* (see below)
1 49180-641 SE VANG INTER-TERM TREASURY	VARIOUS	01/22/2003	576,889.	553,299.	23,590.	
2 Enter your short-term totals, if any, from Schedule D-1, line 2	2					
3 Total short-term sales price amounts. Add lines 1 and 2 in column (d)	3		576,889.			
4 Short-term gain from Form 6252 and short-term gain or (loss) from Forms 4684, 6781, and 8824	4					
5 Net short-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	5					
6 Short-term capital loss carryover. Enter the amount, if any, from line 8 of your 2002 Capital Loss Carryover Worksheet	6				( )	
7a Combine lines 1 through 5 in column (g). If the result is a loss, enter the result. Otherwise, enter -0-. Do not enter more than zero	7a					( )
7b Net short-term capital gain or (loss). Combine lines 1 through 6 in column (f)	7b				23,590.	

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example: 100 sh. XYZ Co.)	(b) Date acquired (Mo., day, yr.)	(c) Date sold (Mo., day, yr.)	(d) Sales price (see page D-5 of the instructions)	(e) Cost or other basis (see page D-5 of the instructions)	(f) Gain or (loss) the entire year Subtract (e) from (d)	(g) Post-May 6 gain or (loss)* (see below)
8						
9 Enter your long-term totals, if any, from Schedule D-1, line 9	9		10,023,580.		279,012.	
10 Total long-term sales price amounts. Add lines 8 and 9 in column (d)	10		10,023,580.			
11 Gain from Form 4797, Part I; long-term gain from Forms 2439 and 6252; and long-term gain or (loss) from Forms 4684, 6781, and 8824	11					
12 Net long-term gain or (loss) from partnerships, S corporations, estates, and trusts from Schedule(s) K-1	12					
13 Capital gain distributions. See page D-1 of the instructions	13					
14 Long-term capital loss carryover. Enter the amount, if any, from line 13 of your 2002 Capital Loss Carryover Worksheet	14				( )	
15 Combine lines 8 through 14 in column (g)	15					
16 Net long-term capital gain or (loss). Combine lines 8 through 14 in column (f)	16				279,012.	

Next: Go to Part III on the back.

Include in column (g) all gains and losses from column (f) from sales, exchanges, or conversions (including installments payments received) after 5, 2003. However, do not include gain attributable to unrecaptured section 1250 gain, "collectibles gains and losses" (as defined on page of the Instructions) or eligible gain on small business stock (see page D-4 of the instructions).

Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule D (Form 1040) 2003

**Part III Taxable Gain or Deductible Loss**

<b>17a</b> Combine lines 7b and 18 and enter the result. If a loss, enter -0- on line 17b and go to line 18. If a gain, enter the gain on Form 1040, line 13a, and go to line 17b below.	<b>17a</b>	302,602.
<b>b</b> Combine lines 7a and 15. If zero or less, enter -0-. Then complete Form 1040 through line 40. Next: • If line 16 of Schedule D is a gain or you have qualified dividends on Form 1040, line 9b, complete <b>Part IV</b> below. • Otherwise, skip the rest of Schedule D and complete the rest of Form 1040.	<b>17b</b>	
<b>18</b> If line 17a is a loss, enter here and on Form 1040, line 13a, the smaller of (a) that loss or (b) (\$3,000) (or, if married filing separately, (\$1,500)) (see page D-7 of the instructions). Next: • If you have qualified dividends on Form 1040, line 9b, complete Form 1040 through line 40, and then complete <b>Part IV</b> below (but skip lines 19 and 20). • Otherwise, skip <b>Part IV</b> below and complete the rest of Form 1040.	<b>18</b>	

**Part IV Tax Computation Using Maximum Capital Gains Rates**

If line 16 or line 17a is zero or less, skip lines 19 and 20 and go to line 21. Otherwise, go to line 19.		
<b>19</b> Enter your unrecaptured section 1250 gain, if any, from line 18 of the worksheet on page D-7.	<b>19</b>	
<b>20</b> Enter your 28% rate gain, if any, from line 7 of the worksheet on page D-8 of the instructions.	<b>20</b>	
If lines 19 and 20 are zero, go to line 21. Otherwise, complete the worksheet on page D-11 of the instructions to figure the amount to enter on lines 35 and 53 below, and skip all other lines below.		
<b>21</b> Enter your taxable income from Form 1040, line 40.	<b>21</b>	813,266.
<b>22</b> Enter the smaller of line 16 or line 17a, but not less than zero.	<b>22</b>	279,012.
<b>23</b> Enter your qualified dividends from Form 1040, line 9b.	<b>23</b>	84,132.
<b>24</b> Add lines 22 and 23.	<b>24</b>	363,144.
<b>25</b> Amount from line 4g of Form 4952 (investment interest expense).	<b>25</b>	
<b>26</b> Subtract line 25 from line 24. If zero or less, enter -0-.	<b>26</b>	363,144.
<b>27</b> Subtract line 26 from line 21. If zero or less, enter -0-.	<b>27</b>	450,122.
<b>28</b> Enter the smaller of line 21 or: • \$56,800 if married filing jointly or qualifying widow(er); • \$28,400 if single or married filing separately; or • \$38,050 if head of household	<b>28</b>	56,800.
If line 27 is more than line 28, skip lines 29-39 and go to line 40.		
<b>29</b> Enter the amount from line 27.	<b>29</b>	
<b>30</b> Subtract line 29 from line 28. If zero or less, enter -0- and go to line 40.	<b>30</b>	
<b>31</b> Add lines 17b and 23*.	<b>31</b>	
<b>32</b> Enter the smaller of line 30 or line 31.	<b>32</b>	
<b>33</b> Multiply line 32 by 5% (.05).	<b>33</b>	
If lines 30 and 32 are the same, skip lines 34-39 and go to line 40.		
<b>34</b> Subtract line 32 from line 30.	<b>34</b>	
<b>35</b> Enter your qualified 5-year gain, if any, from line 8 of the worksheet on page D-10.	<b>35</b>	
<b>36</b> Enter the smaller of line 34 or line 35.	<b>36</b>	
<b>37</b> Multiply line 36 by 8% (.08).	<b>37</b>	
<b>38</b> Subtract line 36 from line 34.	<b>38</b>	
<b>39</b> Multiply line 38 by 10% (.10).	<b>39</b>	
If lines 26 and 30 are the same, skip lines 40-49 and go to line 50.		
<b>40</b> Enter the smaller of line 21 or line 26.	<b>40</b>	363,144.
<b>41</b> Enter the amount from line 30 (if line 30 is blank, enter -0-).	<b>41</b>	
<b>42</b> Subtract line 41 from line 40.	<b>42</b>	363,144.
<b>43</b> Add lines 17b and 23*.	<b>43</b>	84,132.
<b>44</b> Enter the amount from line 32 (if line 32 is blank, enter -0-).	<b>44</b>	
<b>45</b> Subtract line 44 from line 43.	<b>45</b>	84,132.
<b>46</b> Enter the smaller of line 42 or line 45.	<b>46</b>	84,132.
<b>47</b> Multiply line 46 by 15% (.15).	<b>47</b>	12,620.
<b>48</b> Subtract line 46 from line 42.	<b>48</b>	279,012.
<b>49</b> Multiply line 48 by 20% (.20).	<b>49</b>	55,802.
<b>50</b> Figure the tax on the amount on line 27. Use the Tax Table or Tax Rate Schedules, whichever applies.	<b>50</b>	132,749.
<b>51</b> Add lines 33, 37, 39, 47, 49, and 50.	<b>51</b>	201,171.
<b>52</b> Figure the tax on the amount on line 21. Use the Tax Table or Tax Rate Schedules, whichever applies.	<b>52</b>	259,850.
<b>53</b> Tax on all taxable income. Enter the smaller of line 51 or line 52 here and on Form 1040, line 41.	<b>53</b>	201,171.

If lines 23 and 25 are more than zero, see Lines 31 and 43 on page D-9 for the amount to enter.



**SCHEDULE E**  
**(Form 1040)**

**Supplemental Income and Loss**

(From rental real estate, royalties, partnerships,  
S corporations, estates, trusts, REMICs, etc.)

OMB No. 1545-0074

**2003**

Attachment  
Sequence No. **13**

Department of the Treasury  
Internal Revenue Service (99)

▶ Attach to Form 1040 or Form 1041. ▶ See instructions for Schedule E (Form 1040).

Name(s) shown on return

Your social security number

**RICHARD B CHENEY & LYNNE V CHENEY**

**Part I Income or Loss From Rental Real Estate and Royalties**

Note. If you are in the business of renting personal property, use

Schedule C or C-EZ (see page E-2). Report farm rental income or loss from Form 4835 on page 2, line 40.

<b>1</b>	Show the kind and location of each rental real estate property:	<b>2</b>	For each rental real estate property listed on line 1, did you or your family use it during the tax year for personal purposes for more than the greater of:	Yes	No
<b>A</b>	<u>SIMON &amp; SCHUSTER, INC.</u>		• 14 days or		
<b>B</b>	<u>(BOOK ROYALTY PAID TO MRS. CHENEY</u>		• 10% of the total days rented at		
<b>C</b>	<u>AND DONATED TO CHARITY ON A</u>		fair rental value?		
	<u>TAX NEUTRAL BASIS)</u>		(See page E-3.)		

Income:		Properties			Totals
		A	B	C	(Add columns A, B, and C.)
<b>3</b>	Rents received				<b>3</b>
<b>4</b>	Royalties received	<b>338,518.</b>			<b>4 338,518.</b>
<b>Expenses:</b>					
<b>5</b>	Advertising				
<b>6</b>	Auto and travel (see page E-4)				
<b>7</b>	Cleaning and maintenance				
<b>8</b>	Commissions				
<b>9</b>	Insurance				
<b>10</b>	Legal and other professional fees	<b>4,112.</b>			
<b>11</b>	Management fees				
<b>12</b>	Mortgage interest paid to banks, etc. (see page E-4)				<b>12</b>
<b>13</b>	Other interest				
<b>14</b>	Repairs				
<b>15</b>	Supplies				
<b>16</b>	Taxes				
<b>17</b>	Utilities				
<b>18</b>	Other (list) ▶ <u>SEE EXPENSE STMT 9</u>	<b>6,763.</b>			
<b>19</b>	Add lines 5 through 18	<b>10,875.</b>			<b>19 10,875.</b>
<b>20</b>	Depreciation expense or depletion (see page E-4)				<b>20</b>
<b>21</b>	Total expenses. Add lines 19 and 20	<b>10,875.</b>			
<b>22</b>	Income or (loss) from rental real estate or royalty properties. Subtract line 21 from line 3 (rents) or line 4 (royalties). If the result is a (loss), see page E-4 to find out if you must file Form 6198	<b>327,643.</b>			
<b>23</b>	Deductible rental real estate loss. Caution. Your rental real estate loss on line 22 may be limited. See page E-4 to find out if you must file Form 8582. Real estate professionals must complete line 43 on page 2				
<b>24</b>	Income. Add positive amounts shown on line 22. Do not include any losses				<b>24 327,643.</b>
<b>25</b>	Losses. Add royalty losses from line 22 and rental real estate losses from line 23. Enter total losses here				<b>25</b>
<b>26</b>	Total rental real estate and royalty income or (loss). Combine lines 24 and 25. Enter the result here. If Parts II, III, IV, and line 40 on page 2 do not apply to you, also enter this amount on Form 1040, line 17. Otherwise, include this amount in the total on line 41 on page 2				<b>26 327,643.</b>

or Paperwork Reduction Act Notice, see Form 1040 instructions.

Schedule E (Form 1040) 2003



Name of person with self-employment income (as shown on Form 1040)

LYNNE V CHENEY

Social security number of person  
with self-employment income ▶

## Section B - Long Schedule SE

## Part I Self-Employment Tax

**Note.** If your only income subject to self-employment tax is church employee income, skip lines 1 through 4b. Enter -0- on line 4c and go to line 5a. Income from services you performed as a minister or a member of a religious order is not church employee income. See page SE-1.

A If you are a minister, member of a religious order, or Christian Science practitioner and you filed Form 4361, but you had \$400 or more of other net earnings from self-employment, check here and continue with Part I <input type="checkbox"/>	
1 Net farm profit or (loss) from Schedule F, line 38, and farm partnerships, Schedule K-1 (Form 1065), line 15a. <b>Note.</b> Skip this line if you use the farm optional method (see page SE-3)	1
2 Net profit or (loss) from Schedule C, line 31; Schedule C-EZ, line 3; Schedule K-1 (Form 1065), line 15a (other than farming); and Schedule K-1 (Form 1065-B), box 9. Ministers and members of religious orders, see page SE-1 for amounts to report on this line. See page SE-2 for other income to report. <b>Note.</b> Skip this line if you use the nonfarm optional method (see page SE-4)	2 372,223.
3 Combine lines 1 and 2 <b>SEE STATEMENT, 10</b>	3 372,223.
4a If line 3 is more than zero, multiply line 3 by 92.35% (.9235). Otherwise, enter amount from line 3	4a 343,748.
b If you elect one or both of the optional methods, enter the total of lines 15 and 17 here	4b
c Combine lines 4a and 4b. If less than \$400, do not file this schedule; you do not owe self-employment tax. <b>Exception.</b> If less than \$400 and you had church employee income, enter -0- and continue ▶	4c 343,748.
5a Enter your church employee income from Form W-2. See page SE-1 for definition of church employee income	5a
b Multiply line 5a by 92.35% (.9235). If less than \$100, enter -0-	5b
6 Net earnings from self-employment. Add lines 4c and 5b	6 343,748.
7 Maximum amount of combined wages and self-employment earnings subject to social security tax or the 6.2% portion of the 7.65% railroad retirement (tier 1) tax for 2003	7 87,000.00
8a Total social security wages and tips (total of boxes 3 and 7 on Form(s) W-2) and railroad retirement (tier 1) compensation. If \$87,000 or more, skip lines 8b through 10, and go to line 11	8a 80,000.
b Unreported tips subject to social security tax (from Form 4137, line 9)	8b
c Add lines 8a and 8b	8c 80,000.
9 Subtract line 8c from line 7. If zero or less, enter -0- here and on line 10 and go to line 11 ▶	9 7,000.
10 Multiply the smaller of line 6 or line 9 by 12.4% (.124)	10 868.
11 Multiply line 6 by 2.9% (.029)	11 9,969.
12 Self-employment tax. Add lines 10 and 11. Enter here and on Form 1040, line 55	12 10,837.
13 Deduction for one-half of self-employment tax. Multiply line 12 by 50% (.5). Enter the result here and on Form 1040, line 28	13 5,419.

## Part II Optional Methods To Figure Net Earnings (see page SE-3)

<b>Farm Optional Method.</b> You may use this method only if:	
1 Your gross farm income <sup>1</sup> was not more than \$2,400, or	
2 Your net farm profits <sup>2</sup> were less than \$1,733	
3 Maximum income for optional methods	14 1,600.00
5 Enter the smaller of: two-thirds (2/3) of gross farm income <sup>1</sup> (not less than zero) or \$1,600. Also include this amount on line 4b above	15
<b>Nonfarm Optional Method.</b> You may use this method only if:	
1 Your net nonfarm profits <sup>3</sup> were less than \$1,733 and also less than 72.189% of your gross nonfarm income, <sup>4</sup> and	
2 You had net earnings from self-employment of at least \$400 in 2 of the prior 3 years.	
3 <b>Caution.</b> You may use this method no more than five times.	
6 Subtract line 15 from line 14	16
7 Enter the smaller of: two-thirds (2/3) of gross nonfarm income <sup>4</sup> (not less than zero) or the amount on line 16. Also include this amount on line 4b above	17

From Sch. F, line 11, and Sch. K-1 (Form 1065), line 15b.

<sup>3</sup> From Sch. C, line 31; Sch. C-EZ, line 3; Sch. K-1 (Form 1065), line 15a; and Sch. K-1 (Form 1065-B), box 9.

From Sch. F, line 38, and Sch. K-1 (Form 1065), line 15a.

<sup>4</sup> From Sch. C, line 7; Sch. C-EZ, line 1; Sch. K-1 (Form 1065), line 15c; and Sch. K-1 (Form 1065-B), box 8.

Department of the Treasury  
Internal Revenue Service (88)

(Individual, Estate, or Trust)

▶ Attach to Form 1040, 1040NR, 1041, or 990-T.

➤ See separate instructions.

OMB No. 1545-0121

Attachment  
Sequence No. 19

Identifying number as shown on page 1 of your tax return

a separate Form 1116 for each category of income listed below. See *Categories of Income* on page 3 of the instructions. Check only one on each Form 1116. Report all amounts in U.S. dollars except where specified in Part II below.

<input checked="" type="checkbox"/> Passive income	d	<input type="checkbox"/> Shipping income	g	<input type="checkbox"/> Lump-sum distributions
<input type="checkbox"/> High withholding tax interest	e	<input type="checkbox"/> Dividends from a DISC or former DISC	h	<input type="checkbox"/> Section 901(j) income
<input type="checkbox"/> Financial services income	f	<input type="checkbox"/> Certain distributions from a foreign sales corporation (FSC) or former FSC	i	<input type="checkbox"/> Certain income re-sourced by treaty
			j	<input type="checkbox"/> General limitation income

Resident of (name of country) ► **UNITED STATES**

te: If you paid taxes to only one foreign country or U.S. possession, use column A in Part I and line A in Part II. If you paid taxes to more than one foreign country or U.S. possession, use a separate column and line for each country or possession.

**Taxable Income or Loss From Sources Outside the United States (for Category Checked Above)**

	Foreign Country or U.S. Possession			Total
	A	B	C	(Add cols. A, B, and C.)
Enter the name of the foreign country or U.S. possession, . . . . . ▶				
Gross income from sources within country shown above and of the type checked above (see page 7 of the instructions): . . . . .	VARIOUS COUNTRIES			
	27,443.			1 27,443.
Losses and losses (Caution: See pages 9, 11, and 12 of the instructions):				
Expenses definitely related to the income on line 1 (attach statement) . . . . .	NONE			SEE SOURCING STATEMENT 11
Pro rata share of other deductions not definitely related:				
Certain itemized deductions or standard deduction (see instructions) . . . . .	454,649.			
Other deductions (attach statement) . . . . .				
Add lines 3a and 3b . . . . .	454,649.			
Gross foreign source income (see instructions) . . . . .	NONE			
Gross income from all sources (see instructions) . . . . .	1,987,703.			
Divide line 3d by line 3a (see instructions) . . . . .	NONE			
Multiply line 3c by line 3f . . . . .	NONE			
Pro rata share of interest expense (see instructions):				
Home mortgage interest (use worksheet on page 12 of the instructions) . . . . .				
Other interest expense . . . . .				
Losses from foreign sources . . . . .				
Add lines 2, 3g, 4a, 4b, and 5 . . . . .	NONE			8 NONE
Subtract line 6 from line 1. Enter the result here and on line 14, page 2 . . . . . ▶				7 27,443.

**Foreign Taxes Paid or Accrued (see page 12 of the instructions)**[illegible]

Add lines A through C, column (x). Enter the total here and on line 9, page 2

Network Reduction Act Notice, see page 16 of the Instructions

**Part III Figuring the Credit**

<b>9</b> Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I . . . . .	<b>9</b>	<b>6,977.</b>	
<b>10</b> Carryback or carryover (attach detailed computation) . . . . .	<b>10</b>		
<b>11</b> Add lines 9 and 10 . . . . .	<b>11</b>	<b>6,977.</b>	
<b>12</b> Reduction in foreign taxes (see page 13 of the instructions) . . . . .	<b>12</b>		
<b>13</b> Subtract line 12 from line 11. This is the total amount of foreign taxes available for credit . . . . .	<b>13</b>		<b>6,977.</b>
<b>14</b> Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I (see page 14 of the instructions) . . . . .	<b>14</b>	<b>27,443.</b>	
<b>15</b> Adjustments to line 14 (see page 14 of the instructions) . . . . .	<b>15</b>		
<b>16</b> Combine the amounts on lines 14 and 15. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 17 through 21. However, if you are filing more than one Form 1116, you must complete line 19.) . . . . .	<b>16</b>	<b>27,443.</b>	
<b>17</b> <b>Individuals:</b> Enter the amount from Form 1040, line 38. If you are a nonresident alien, enter the amount from Form 1040NR, line 36. <b>Estates and trusts:</b> Enter your taxable income without the deduction for your exemption. <b>SEE STATEMENT 12</b> <i>Caution: If you figured your tax using the lower rates on qualified dividends or capital gains, see page 15 of the instructions.</i>	<b>17</b>	<b>645,608.</b>	
<b>18</b> Divide line 16 by line 17. If line 16 is more than line 17, enter "1". . . . .	<b>18</b>		<b>0.04250122</b>
<b>19</b> <b>Individuals:</b> Enter the amount from Form 1040, line 41. If you are a nonresident alien, enter the amount from Form 1040NR, line 39. <b>Estates and trusts:</b> Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 36 and 37. . . . . <i>Caution: If you are completing line 19 for separate category g (lump-sum distributions), see page 16 of the instructions.</i>	<b>19</b>		<b>201,171.</b>
<b>20</b> Multiply line 19 by line 18 (maximum amount of credit) . . . . .	<b>20</b>		<b>8,551.</b>
<b>21</b> Enter the smaller of line 13 or line 20. If this is the only Form 1116 you are filing, skip lines 22 through 30 and enter this amount on line 31. Otherwise, complete the appropriate line in Part IV (see page 16 of the instructions). . . . .	<b>21</b>		<b>6,977.</b>

**Part IV Summary of Credits From Separate Parts III (see page 16 of the instructions)**

<b>22</b> Credit for taxes on passive income . . . . .	<b>22</b>		
<b>23</b> Credit for taxes on high withholding tax interest . . . . .	<b>23</b>		
<b>24</b> Credit for taxes on financial services income . . . . .	<b>24</b>		
<b>25</b> Credit for taxes on shipping income . . . . .	<b>25</b>		
<b>26</b> Credit for taxes on dividends from a DISC or former DISC and certain distributions from a FSC or former FSC . . . . .	<b>26</b>		
<b>27</b> Credit for taxes on lump-sum distributions . . . . .	<b>27</b>		
<b>28</b> Credit for taxes on certain income re-sourced by treaty . . . . .	<b>28</b>		
<b>29</b> Credit for taxes on general limitation income . . . . .	<b>29</b>		
<b>30</b> Add lines 22 through 29 . . . . .	<b>30</b>		
<b>31</b> Enter the smaller of line 19 or line 30 . . . . .	<b>31</b>	<b>6,971.</b>	
<b>32</b> Reduction of credit for international boycott operations. See instructions for line 12 on page 14 . . . . .	<b>32</b>		
<b>33</b> Subtract line 32 from line 31. This is your foreign tax credit. Enter here and on Form 1040, line 44; Form 1040NR, line 42; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a . . . . .	<b>33</b>		<b>6,971.</b>

paperwork Reduction Act Notice: See page 18 of the Instructions.

# ALTERNATIVE MINIMUM TAX

Form 1116 (2003) **RICHARD B CHENEY & LYNNE V CHENEY**

Page 2

## **Part III** Figuring the Credit

9	Enter the amount from line 8. These are your total foreign taxes paid or accrued for the category of income checked above Part I . . . . .	9	6,977.	
10	Carryback or carryover (attach detailed computation) . . . <b>STMT. 13.</b>	10	124.	
11	Add lines 9 and 10 . . . . .	11	7,101.	
12	Reduction in foreign taxes (see page 13 of the instructions) . . . . .	12		
13	Subtract line 12 from line 11. This is the total amount of foreign taxes available for credit . . . . .	13	7,101.	
14	Enter the amount from line 7. This is your taxable income or (loss) from sources outside the United States (before adjustments) for the category of income checked above Part I (see page 14 of the instructions) . . . . .	14	27,443.	
15	Adjustments to line 14 (see page 14 of the instructions) . . . . .	15		
16	Combine the amounts on lines 14 and 15. This is your net foreign source taxable income. (If the result is zero or less, you have no foreign tax credit for the category of income you checked above Part I. Skip lines 17 through 21. However, if you are filing more than one Form 1116, you must complete line 19.) . . . . .	16	27,443.	
17	<b>Individuals:</b> Enter the amount from Form 1040, line 38. If you are a nonresident alien, enter the amount from Form 1040NR, line 36. <b>Estates and trusts:</b> Enter your taxable income without the deduction for your exemption. <b>SEE STATEMENT 14.</b> <b>Caution:</b> If you figured your tax using the lower rates on qualified dividends or capital gains, see page 15 of the instructions.	17	851,095.	
18	Divide line 16 by line 17. If line 16 is more than line 17, enter "1". . . . .	18	0.03224434	
19	<b>Individuals:</b> Enter the amount from Form 1040, line 41. If you are a nonresident alien, enter the amount from Form 1040NR, line 39. <b>Estates and trusts:</b> Enter the amount from Form 1041, Schedule G, line 1a, or the total of Form 990-T, lines 38 and 37. . . . . <b>Caution:</b> If you are completing line 19 for separate category g (lump-sum distributions), see page 16 of the instructions	19	248,493.	
20	Multiply line 19 by line 18 (maximum amount of credit) . . . . .	20	8,012.	
21	Enter the smaller of line 13 or line 20. If this is the only Form 1116 you are filing, skip lines 22 through 30 and enter this amount on line 31. Otherwise, complete the appropriate line in Part IV (see page 16 of the instructions) . . . . .	21	7,101.	

## **Part IV** Summary of Credits From Separate Parts III (see page 16 of the instructions)

22	Credit for taxes on passive income . . . . .	22		
23	Credit for taxes on high withholding tax interest . . . . .	23		
24	Credit for taxes on financial services income . . . . .	24		
25	Credit for taxes on shipping income . . . . .	25		
26	Credit for taxes on dividends from a DISC or former DISC and certain distributions from a FSC or former FSC . . . . .	26		
27	Credit for taxes on lump-sum distributions . . . . .	27		
28	Credit for taxes on certain income re-sourced by treaty . . . . .	28		
29	Credit for taxes on general limitation income . . . . .	29		
30	Add lines 22 through 29 . . . . .	30		
31	Enter the smaller of line 19 or line 30 . . . . .	31	7,101.	
32	Reduction of credit for international boycott operations. See instructions for line 12 on page 14 . . . . .	32		
33	Subtract line 32 from line 31. This is your foreign tax credit. Enter here and on Form 1040, line 44; Form 1040NR, line 42; Form 1041, Schedule G, line 2a; or Form 990-T, line 40a . . . . .	33	7,101.	

Form 6251

## Alternative Minimum Tax - Individuals

OMB No. 1545-0227

2003

Department of the Treasury  
Internal Revenue Service (99)▶ See separate instructions.  
▶ Attach to Form 1040 or Form 1040NR.

Name(s) shown on Form 1040

Your social security number

RICHARD B CHENEY &amp; LINNE V CHENEY

**Part I Alternative Minimum Taxable Income** (See instructions for how to complete each line.)

1	If filing Schedule A (Form 1040), enter the amount from Form 1040, line 38, and go to line 2. Otherwise, enter the amount from Form 1040, line 35, and go to line 7. (If zero or less, enter as a negative amount.)	1	813,266.
2	Medical and dental. Enter the smaller of Schedule A (Form 1040), line 4, or 2 1/2% of Form 1040, line 35	2	
3	Taxes from Schedule A (Form 1040), line 9	3	44,728.
4	Certain interest on a home mortgage not used to buy, build, or improve your home	4	
5	Miscellaneous deductions from Schedule A (Form 1040), line 28	5	122,632.
6	If Form 1040, line 35, is over \$139,500 (over \$69,750 if married filing separately), enter the amount from line 9 of the worksheet for Schedule A (Form 1040), line 28	6	( 33,952.)
7	Tax refund from Form 1040, line 10 or line 21	7	
8	Investment interest expense (difference between regular tax and AMT)	8	
9	Depletion (difference between regular tax and AMT)	9	
10	Net operating loss deduction from Form 1040, line 21. Enter as a positive amount	10	
11	Interest from specified private activity bonds exempt from the regular tax	11	71,979.
12	Qualified small business stock (see instructions)	12	
13	Exercise of incentive stock options (excess of AMT income over regular tax income)	13	
14	Estates and trusts (amount from Schedule K-1 (Form 1041), line 9)	14	
15	Electing large partnerships (amount from Schedule K-1 (Form 1065-B), box 8)	15	
16	Disposition of property (difference between AMT and regular tax gain or loss)	16	
17	Depreciation on assets placed in service after 1985 (difference between regular tax and AMT)	17	
18	Passive activities (difference between AMT and regular tax income or loss)	18	
19	Loss limitations (difference between AMT and regular tax income or loss)	19	
20	Circulation costs (difference between regular tax and AMT)	20	
21	Long-term contracts (difference between AMT and regular tax income)	21	
22	Mining costs (difference between regular tax and AMT)	22	
23	Research and experimental costs (difference between regular tax and AMT)	23	
24	Income from certain installment sales before January 1, 1987	24	( )
25	Intangible drilling costs preference	25	
26	Other adjustments, including income-based related adjustments	26	
27	Alternative tax net operating loss deduction	27	( )
28	Alternative minimum taxable income. Combine lines 1 through 27. (If married filing separately and line 28 is more than \$191,000, see page 7 of the instructions.)	28	1,018,753.

**Part II Alternative Minimum Tax**

29	Exemption. (If this form is for a child under age 14, see page 7 of the instructions.)		
	IF your filing status is . . .	AND line 28 is not over . . .	THEN enter on line 29 . . .
	Single or head of household . . .	\$112,500 . . .	\$40,250
	Married filing jointly or qualifying widow(er) . . .	150,000 . . .	58,000
	Married filing separately . . .	75,000 . . .	29,000
	If line 28 is over the amount shown above for your filing status, see page 7 of the instructions.		
30	Subtract line 29 from line 28. If zero or less, enter -0- here and on lines 33 and 35 and stop here		30 1,018,753.
31	• If you reported capital gain distributions directly on Form 1040, line 13a; you reported qualified dividends on Form 1040, line 9b; or you had a gain on both lines 16 and 17a of Schedule D (Form 1040) (as refigured for the AMT, if necessary), complete Part III on the back and enter the amount from line 85 here. • All others: If line 30 is \$175,000 or less (\$87,500 or less if married filing separately), multiply line 30 by 28% (.28). Otherwise, multiply line 30 by 28% (.28) and subtract \$3,500 (\$1,750 if married filing separately) from the result.		31 248,493.
32	Alternative minimum tax foreign tax credit (see page 7 of the instructions)		32 7,101.
33	Tentative minimum tax. Subtract line 32 from line 31		33 241,392.
34	Tax from Form 1040, line 41 (minus any tax from Form 4972 and any foreign tax credit from Form 1040, line 44)		34 194,194.
35	Alternative minimum tax. Subtract line 34 from line 33. If zero or less, enter -0-. Enter here and on Form 1040, line 42		35 47,198.

For Paperwork Reduction Act Notice, see page 8 of the instructions.

Form 6251 (2003)

JSA  
3X4700 2.000

TC4769 1278

V03-5.2 751669



Form **8283**

Rev. October 1998)

Department of the Treasury  
Internal Revenue Service

Name(s) shown on your income tax return

**RICHARD B CHENEY & LYNNE V CHENEY**

Note: Figure the amount of your contribution deduction before completing this form. See your tax return instructions.

**Section A** - List in this section only items (or groups of similar items) for which you claimed a deduction of \$5,000 or less. Also, list certain publicly traded securities even if the deduction is over \$5,000 (see instructions).

**Part I Information on Donated Property** - If you need more space, attach a statement.

(a) Name and address of the donee organization		(b) Description of donated property
<b>A</b>	<b>CAPITAL PARTNERS FOR EDUCATION 1524 35TH NW, WASH, DC 20007</b>	<b>12 SHS OF ANADARKO PETROLEUM CORP. STOCK</b>
<b>B</b>		
<b>C</b>		
<b>D</b>		
<b>E</b>		

Note: If the amount you claimed as a deduction for the item is \$500 or less, you do not have to complete columns (d), (e), and (f).

	(c) Date of the contribution	(d) Date acquired by donor (mo., yr.)	(e) How acquired by donor	(f) Donor's cost or adjusted basis	(g) Fair market value	(h) Method used to determine the fair market value
<b>A</b>	<b>05/06/2003</b>	<b>02/12/2003</b>	<b>DEF. COMP</b>	<b>507.</b>	<b>539.</b>	<b>AVERAGE HIGH/LOW</b>
<b>B</b>						
<b>C</b>						
<b>D</b>						
<b>E</b>						

**Part II Other Information** - Complete line 2 if you gave less than an entire interest in property listed in Part I.

Complete line 3 if conditions were attached to a contribution listed in Part I.

- 2 If, during the year, you contributed less than the entire interest in the property, complete lines a - e
- a Enter the letter from Part I that identifies the property ► . If Part II applies to more than one property, attach a separate statement.
- b Total amount claimed as a deduction for the property listed in Part I: (1) For this tax year ►  
(2) For any prior tax years ►
- c Name and address of each organization to which any such contribution was made in a prior year (complete only if different from the donee organization above).
- Name of charitable organization (donee)
- Address (number, street, and room or suite no.)
- City or town, state, and ZIP code
- d For tangible property, enter the place where the property is located or kept ►
- e Name of any person, other than the donee organization, having actual possession of the property ►

f If conditions were attached to any contribution listed in Part I, answer the questions a - c and attach the required statement (see instructions).

	Yes	No
a Is there a restriction, either temporary or permanent, on the donee's right to use or dispose of the donated property?		
b Did you give to anyone (other than the donee organization or another organization participating with the donee organization in cooperative fundraising) the right to the income from the donated property or to the possession of the property, including the right to vote donated securities, to acquire the property by purchase or otherwise, or to designate the person having such income, possession, or right to acquire?		
c Is there a restriction limiting the donated property for a particular use?		

s) shown on your income tax return

Identifying number

**HARD B CHENEY & LYNNE V CHENEY****on B - Appraisal Summary** - List in this section only items (or groups of similar items) for which you claimed a deduction of more than \$5,000 per item or group. **Exception.** Report contributions for certain publicly traded securities only in Section A.

If you donated art, you may have to attach the complete appraisal. See the Note in Part I below.

**I Information on Donated Property - To be completed by the taxpayer and/or appraiser.**

Check type of property:

☐ Art\* (contribution of \$20,000 or more)    ☐ Real Estate    ☐ Gems/Jewelry    ☐ Stamp Collections  
☐ Art\* (contribution of less than \$20,000)    ☐ Coin Collections    ☐ Books    ☐ Other

includes paintings, sculptures, watercolors, prints, drawings, ceramics, antique furniture, decorative arts, textiles, carpets, silver, rare scripts, historical memorabilia, and other similar objects.

If your total art contribution deduction was \$20,000 or more, you must attach a complete copy of the signed appraisal. See instructions.

(a) Description of donated property (if you need more space, attach a separate statement)		(b) If tangible property was donated, give a brief summary of the overall physical condition at the time of the gift	(c) Appraised fair market value

  

(d) Date acquired by donor (mo., yr.)	(e) How acquired by donor	(f) Donor's cost or adjusted basis	(g) For bargain sales, enter amount received	See instructions	
				(h) Amount claimed as a deduction	(i) Average trading price of securities

**II Taxpayer (Donor) Statement - List each item included in Part I above that the appraisal identifies as having a value of \$500 or less. See instructions.**

are that the following item(s) included in Part I above has to the best of my knowledge and belief an appraised value of not more than \$500 (item). Enter identifying letter from Part I and describe the specific item. See instructions. ▶

Signature of taxpayer (donor) ▶

Date ▶

**III Declaration of Appraiser**

I am not the donor, the donee, a party to the transaction in which the donor acquired the property, employed by, or related to any foregoing persons, or married to any person who is related to any of the foregoing persons. And, if regularly used by the donor, donee, or to the transaction, I performed the majority of my appraisals during my tax year for other persons.

I declare that I hold myself out to the public as an appraiser or perform appraisals on a regular basis; and that because of my qualifications described in the appraisal, I am qualified to make appraisals of the type of property being valued. I certify that the appraisal fees were not based on a percentage of the appraised property value. Furthermore, I understand that a false or fraudulent overstatement of the property value as included in the qualified appraisal or this appraisal summary may subject me to the penalty under section 6701(a) (aiding and abetting the statement of tax liability). I affirm that I have not been barred from presenting evidence or testimony by the Director of Practice.

Signature ▶

Title ▶

Date of appraisal ▶

Business address (including room or suite no.)

Identifying number

City, town, state, and ZIP code

**IV Donee Acknowledgment - To be completed by the charitable organization.**

The charitable organization acknowledges that it is a qualified organization under section 170(c) and that it received the donated property as described in Section B, Part I, above on ▶

(Date)

Furthermore, this organization affirms that in the event it sells, exchanges, or otherwise disposes of the property described in Section B, Part I (or any portion thereof) within 2 years after the date of receipt, it will file Form 8282, Donee Information Return, with the IRS and give the donor a copy of that form. This acknowledgment does not represent agreement with the claimed fair market value.

Does the organization intend to use the property for an unrelated use? ▶ ☐ Yes ☐ No

Name of charitable organization (donee)

Employer identification number

Business address (number, street, and room or suite no.)

City or town, state, and ZIP code

Authorized signature

Title

Date

4562

# Depreciation and Amortization

## (Including Information on Listed Property)

OMB No. 1545-0172

2003

Attachment  
Sequence No. 67Department of the Treasury  
Internal Revenue Service

▶ See separate instructions. ▶ Attach to your tax return.

Name(s) shown on return

Business or activity to which this form relates

Identifying number

RICHARD B CHENEY &amp; LYNNE V CHENEY SCHEDULE A LINE 22

**Part I Election To Expense Certain Property Under Section 179**

Note: If you have any listed property, complete Part V before you complete Part I.

1	Maximum amount. See page 2 of the instructions for a higher limit for certain businesses . . . . .	1	\$100,000
2	Total cost of section 179 property placed in service (see page 2 of the instructions) . . . . .	2	
3	Threshold cost of section 179 property before reduction in limitation . . . . .	3	\$400,000
4	Reduction in limitation. Subtract line 3 from line 2. If zero or less, enter -0- . . . . .	4	
5	Dollar limitation for tax year. Subtract line 4 from line 1. If zero or less, enter -0-. If married filing separately, see page 2 of the instructions . . . . .	5	
6	(a) Description of property	(b) Cost (business use only)	(c) Elected cost
7	Listed property. Enter the amount from line 29 . . . . .	7	
8	Total elected cost of section 179 property. Add amounts in column (c), lines 6 and 7 . . . . .	8	
9	Tentative deduction. Enter the smaller of line 5 or line 8 . . . . .	9	
10	Carryover of disallowed deduction from line 13 of your 2002 Form 4562 . . . . .	10	
11	Business income limitation. Enter the smaller of business income (not less than zero) or line 5 (see instructions) . . . . .	11	
12	Section 179 expense deduction. Add lines 9 and 10, but do not enter more than line 11 . . . . .	12	
13	Carryover of disallowed deduction to 2004. Add lines 9 and 10, less line 12 . . . . . ▶	13	

Note: Do not use Part II or Part III below for listed property. Instead, use Part V.

**Part II Special Depreciation Allowance and Other Depreciation (Do not include listed property.)**

14	Special depreciation allowance for qualified property (other than listed property) placed in service during the tax year (see page 3 of the instructions) . . . . .	14	
15	Property subject to section 168(f)(1) election (see page 4 of the instructions) . . . . .	15	
16	Other depreciation (including ACRS) (see page 4 of the instructions) . . . . .	16	

**Part III MACRS Depreciation (Do not include listed property.) (See page 4 of the instructions.)****Section A**

17	MACRS deductions for assets placed in service in tax years beginning before 2003 . . . . .	17	
18	If you are electing under section 168(i)(4) to group any assets placed in service during the tax year into one or more general asset accounts, check here . . . . . ▶ <input type="checkbox"/>		

**Section B — Assets Placed in Service During 2003 Tax Year Using the General Depreciation System**

(a) Classification of property	(b) Month and year placed in service	(c) Basis for depreciation (business/investment use only — see instructions)	(d) Recovery period	(e) Convention	(f) Method	(g) Depreciation deduction
19a 3-year property						
b 5-year property						
c 7-year property						
d 10-year property						
e 15-year property						
f 20-year property						
g 25-year property			25 yrs.		S/L	
h Residential rental property			27.5 yrs.	MM	S/L	
i Nonresidential real property			39 yrs.	MM	S/L	
				MM	S/L	

**Section C — Assets Placed in Service During 2003 Tax Year Using the Alternative Depreciation System**

20a Class life				S/L	
b 12-year			12 yrs.	S/L	
c 40-year			40 yrs.	MM	S/L

**Part IV Summary (see page 6 of the instructions)**

21	Listed property. Enter amount from line 28 . . . . .	21	
22	Total. Add amounts from line 12, lines 14 through 17, lines 19 and 20 in column (g), and line 21. Enter here and on the appropriate lines of your return. Partnerships and S corporations — see instr. . . . .	22	
23	For assets shown above and placed in service during the current year, enter the portion of the basis attributable to section 263A costs . . . . .	23	

For Paperwork Reduction Act Notice, see separate instructions. Form 4562 (2003)

irm 4562 (2003)

**Part V Listed Property** (Include automobiles, certain other vehicles, cellular telephones, certain computers, and property used for entertainment, recreation, or amusement.)**Note:** For any vehicle for which you are using the standard mileage rate or deducting lease expense, complete only 24a, 24b, columns (e) through (c) of Section A, all of Section B, and Section C if applicable.**Section A — Depreciation and Other Information** (Caution: See page 7 of the instructions for limits for passenger automobiles.)**24a** Do you have evidence to support the business/investment use claimed? ☐ Yes ☐ No **24b** If "Yes," is the evidence written? ☐ Yes ☐ No

(a) Type of property (list vehicles first)	(b) Date placed in service	(c) Business/Investment use percentage	(d) Cost or other basis	(e) Basis for depreciation (business/investment use only)	(f) Recovery period	(g) Method/Convention	(h) Depreciation deduction	(i) Elected section 179 cost
<b>25</b> Special depreciation allowance for qualified listed property placed in service during the tax year and used more than 50% in a qualified business use (see page 6 of the instructions) ..... <b>25</b>								
<b>26</b> Property used more than 50% in a qualified business use (see page 6 of the instructions):								
		%						
		%						
		%						
<b>27</b> Property used 50% or less in a qualified business use (see page 6 of the instructions):								
		%			S/L -			
		%			S/L -			
		%			S/L -			
<b>28</b> Add amounts in column (h), lines 25 through 27. Enter here and on line 21, page 1 .....								<b>28</b>
<b>29</b> Add amounts in column (i), line 26. Enter here and on line 7, page 1 .....								<b>29</b>

**Section B — Information on Use of Vehicles**

Complete this section for vehicles used by a sole proprietor, partner, or other "more than 5% owner," or related person. If you provided vehicles to your employees, first answer the questions in Section C to see if you meet an exception to completing this section for those vehicles.

	(a) Vehicle 1	(b) Vehicle 2	(c) Vehicle 3	(d) Vehicle 4	(e) Vehicle 5	(f) Vehicle 6
<b>30</b> Total business/investment miles driven during the year (do not include commuting miles — see page 2 of the instructions) .....						
<b>31</b> Total commuting miles driven during the year .....						
<b>32</b> Total other personal (noncommuting) miles driven .....						
<b>33</b> Total miles driven during the year. Add lines 30 through 32 .....						
<b>34</b> Was the vehicle available for personal use during off-duty hours? .....	Yes	No	Yes	No	Yes	No
<b>35</b> Was the vehicle used primarily by a more than 5% owner or related person? .....						
<b>36</b> Is another vehicle available for personal use? .....						

**Section C — Questions for Employers Who Provide Vehicles for Use by Their Employees**

Answer these questions to determine if you meet an exception to completing Section B for vehicles used by employees who are not more than 5% owners or related persons (see page 8 of the instructions).

	Yes	No
<b>37</b> Do you maintain a written policy statement that prohibits all personal use of vehicles, including commuting, by your employees? .....		
<b>38</b> Do you maintain a written policy statement that prohibits personal use of vehicles, except commuting, by your employees? See page 8 of the instructions for vehicles used by corporate officers, directors, or 1% or more owners .....		
<b>39</b> Do you treat all use of vehicles by employees as personal use? .....		
<b>40</b> Do you provide more than five vehicles to your employees, obtain information from your employees about the use of the vehicles, and retain the information received? .....		
<b>41</b> Do you meet the requirements concerning qualified automobile demonstration use? (See page 9 of the instructions.) .....		

**Note:** If your answer to 37, 38, 39, 40, or 41 is "Yes," do not complete Section B for the covered vehicles.**Part VI Amortization**

(a) Description of costs	(b) Date amortization begins	(c) Amortizable amount	(d) Code section	(e) Amortization period or percentage	(f) Amortization for this year
<b>42</b> Amortization of costs that begins during your 2003 tax year (see page 9 of the instructions):					
<b>43</b> Amortization of costs that began before your 2003 tax year .....					<b>43</b> 6,486
<b>44</b> Total. Add amounts in column (f). See page 9 of the instructions for where to report .....					<b>44</b> 6,486